



Aptean

Interface - ORS Data Extract Suite Guide

Calidus TMS - 12.48

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Reference: INTERFACE

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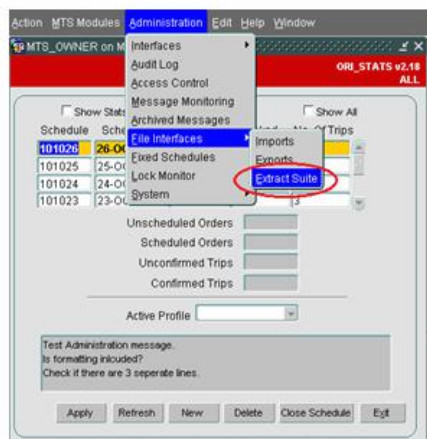
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1 Data Extract Suite (ORS)

The ORS Reporting Suite is based on a number of key database tables in order to allow the user a degree of flexibility in extracting the data they require. The data is extracted into the .csv format which can be viewed in Microsoft Excel.

1.1 Accessing the Extract Suite

To gain access to the Reporting Suite, select "Administration", "File Interfaces" and "Extract Suite" (see below).



1.2 Creating a New Report

The following example details the steps required to create a new report from scratch based on "Orders".

A [list](#) of all available ORS reports is available on the Assist pages.

The "Orders" report has 3 report levels (Header, Line, Items), each allowing a different amount of information to be displayed and manipulated by the user. The table below shows the data available at each level. If Report Level Items (3) is selected then all levels above that (Line(2) and Header (1)) will also be extracted.

| Report Type | Report Level | Report Level Description | Available Columns |
|-------------|--------------|--------------------------|-------------------|
| ORDERS | 1 | HEADER | sched_name |
| ORDERS | 1 | HEADER | oms_ref |
| ORDERS | 1 | HEADER | status |
| ORDERS | 1 | HEADER | customer |
| ORDERS | 2 | LINE | line_no |
| ORDERS | 2 | LINE | product_type |
| ORDERS | 2 | LINE | DU_type |
| ORDERS | 2 | LINE | Quantity |
| ORDERS | 3 | ITEMS | item_identifier |
| ORDERS | 3 | ITEMS | qty_ordererd |

We will begin by selecting a Report Type of "Orders" and a Report Level of "Header" as shown below.



If we select a Report Type of "Orders" and "Report Level" of Header we see the following columns shown on the form.



| Level | Title | Displayed Title | Sel | From | To | Sort | Req Inc |
|--------|-----------|-----------------|-----|------|----|------|---------|
| HEADER | Schedule | Schedule | Y | | | | |
| HEADER | Order Ref | Order Ref | R | | | | |
| HEADER | Status | Status | Y | | | | |
| HEADER | Customer | Customer | Y | | | | |

We could run this report as it stands but it is advisable to firstly restrict the report in some way otherwise the system could try to retrieve thousands of order records which will potentially take a long time.

1.3 Restricting the Report

In this example, we will restrict the report by entering a restriction of the "order number" from 988046 to 988079. This is possible because the "Sel" column is set to "R" (Range Selection). When the column is set to "Y" you can enter a value in the "From" column only. When the column is set to "N", no restrictions can be set (see the following example).

| Level | Title | Displayed Title | Sel | From | To | Sort | Req Inc |
|--------|-----------|-----------------|-----|--------|--------|------|---------|
| HEADER | Schedule | Schedule | Y | | | | |
| HEADER | Order Ref | Order Ref | R | 988046 | 988079 | | |
| HEADER | Status | Status | Y | | | | |
| HEADER | Customer | Customer | Y | | | | |

1.4 Saving the Report

When the report restriction has been decided, the user is required to click on the "Save Selection" button at the bottom left of the screen. This would display a pop-up as shown below:

A report name needs to be entered so in this example we will enter "orderheader1" (see below).

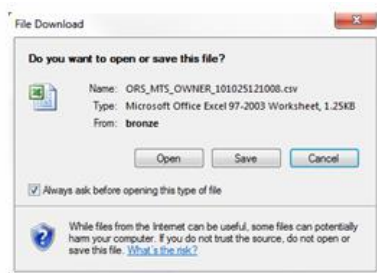
Once the "Save Report" button is clicked, this report is saved and can be retrieved at a later date and a .csv extract file produced. Having clicked the "Save Report" button, the report name is submitted to the "Saved Reports" list of values at the top of the screen:



| Level | Title | Displayed Title | Set From | To | Sort | Row No |
|--------|-----------|-----------------|-----------|--------|------|--------|
| HEADER | Schedule | Schedule | IV | | IV | 1 |
| HEADER | Order Ref | Order Ref | R. 988046 | 988076 | Y | 2 |
| HEADER | Status | Status | IV | | IV | 3 |
| HEADER | Customer | Customer | IV | | IV | 4 |

1.5 Creating the CSV Extract

Now we are ready to produce the extract .csv file. To do this, simply select the "Create CSV" button (having firstly done the steps in sections 2.1 and 2.2). The user will be shown the following confirmation pop-up, asking whether to open, save or cancel the extract. In this example we will select "Open".



Once the "Open" option has been selected, Microsoft Excel will open and display the contents of the .csv file (see the following .csv extract example). The time taken to do this depends on the number of records to be retrieved by the Extract Suite screen.

| ORS_MTS_OWNER_101025121008 | | | | |
|----------------------------|----------|-----------|---------|---|
| | A | B | C | D |
| 1 | Schedule | Order Ref | Status | |
| 2 | 950612 | 988046 | INVALID | |
| 3 | 950612 | 988047 | INVALID | |
| 4 | 950612 | 988048 | INVALID | |
| 5 | 950612 | 988049 | INVALID | |
| 6 | 950612 | 988050 | INVALID | |
| 7 | 950612 | 988051 | INVALID | |
| 8 | 950612 | 988052 | INVALID | |
| 9 | 950612 | 988053 | INVALID | |
| 10 | 950612 | 988054 | INVALID | |
| 11 | 950612 | 988055 | INVALID | |
| 12 | 950612 | 988056 | INVALID | |
| 13 | 950612 | 988057 | INVALID | |
| 14 | 950612 | 988058 | INVALID | |
| 15 | 950612 | 988059 | INVALID | |
| 16 | 950612 | 988060 | INVALID | |
| 17 | 950612 | 988061 | INVALID | |
| 18 | 950612 | 988062 | INVALID | |
| 19 | 950612 | 988063 | INVALID | |
| 20 | 950612 | 988064 | INVALID | |
| 21 | 950612 | 988065 | INVALID | |
| 22 | 950612 | 988066 | INVALID | |
| 23 | 950612 | 988067 | INVALID | |
| 24 | 950612 | 988068 | INVALID | |
| 25 | 950612 | 988069 | INVALID | |



As can be seen, the 3 selected columns from the screen (Schedule, Order Ref and Status) are included in the extract file.

1.6 Amending the Report Titles

If we wished to change the Excel column titles, we need to change the "Displayed Title" on the form. In the following example, we have amended the Displayed Title from "Order Ref" to "Order Reference".

The screenshot shows the Oracle Reporting Suite interface. At the top, there are dropdown menus for 'Report Type' (set to ORDERS), 'Report Level' (set to HEADER), and 'Saved Reports' (set to orderheader1). Below these are buttons for 'Refresh', 'Create CSV', and 'Close'. The main table has columns: Level, Title, Displayed Title, Set From, To, Sort, and Req Inc. The 'Order Ref' row is highlighted in yellow, and its 'Displayed Title' is 'Order Reference'.

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|--------|---------|
| HEADER | Schedule | Schedule | Y | | Y | ✓ |
| HEADER | Order Ref | Order Reference | Y | 988046 | 988079 | Y |
| HEADER | Status | Status | Y | | | Y |
| HEADER | Customer | Customer | Y | | | Y |

Having amended the Displayed Title, by clicking the "Create CSV" button, we can now see the amended column heading in the .csv Excel extract file.

The screenshot shows an Excel spreadsheet titled 'ORS_MTS_OWNER_101026111059 [Read-Only]'. The spreadsheet has three columns: A, B, and C. Column A is 'Schedule', Column B is 'Order Reference', and Column C is 'Status'. The data rows show various order numbers and their status, all marked as 'INVALID'.

| | A | B | C |
|----|----------|-----------------|---------|
| 1 | Schedule | Order Reference | Status |
| 2 | 950612 | 988046 | INVALID |
| 3 | 950612 | 988079 | INVALID |
| 4 | 950612 | 988048 | INVALID |
| 5 | 950612 | 988049 | INVALID |
| 6 | 950612 | 988047 | INVALID |
| 7 | 950612 | 988078 | INVALID |
| 8 | 950612 | 988077 | INVALID |
| 9 | 950612 | 988050 | INVALID |
| 10 | 950612 | 988051 | INVALID |
| 11 | 950612 | 988052 | INVALID |
| 12 | 950612 | 988053 | INVALID |
| 13 | 950612 | 988054 | INVALID |
| 14 | 950612 | 988055 | INVALID |
| 15 | 950612 | 988056 | INVALID |
| 16 | 950612 | 988057 | INVALID |

1.7 Sorting Report Columns

There is also the option to sort the output by entering a sort order into the "Sort" column on the form (see below). Further sorts can be done by entering 2, 3 etc.

The screenshot shows the Oracle Reporting Suite interface. The 'Status' row is highlighted in yellow, and its 'Sort' value is '1'.

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|--------|---------|
| HEADER | Schedule | Schedule | Y | | Y | ✓ |
| HEADER | Order Ref | Order Reference | Y | 988046 | 988079 | Y |
| HEADER | Status | Status | Y | | 1 | Y |
| HEADER | Customer | Customer | Y | | | Y |

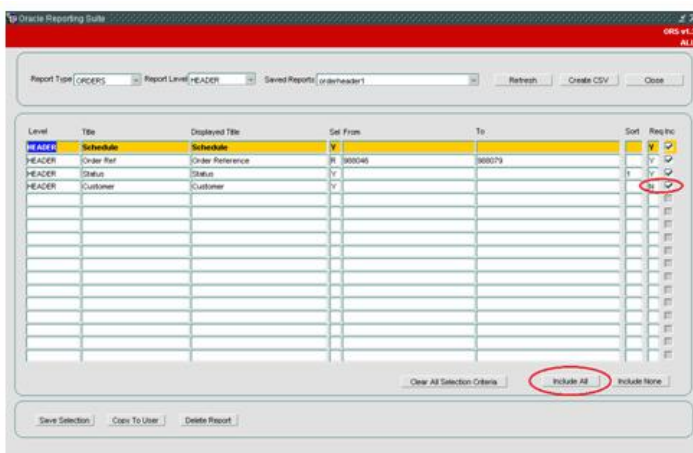
As can now be seen, the Status column is now sorted alphabetically in the .csv Excel extract file.



| | | | |
|----|---------------|-----------|--|
| 28 | 950612 988069 | INVALID | |
| 29 | 950612 988070 | INVALID | |
| 30 | 950612 988071 | INVALID | |
| 31 | 950612 988072 | INVALID | |
| 32 | 950612 988073 | INVALID | |
| 33 | 950612 988074 | INVALID | |
| 34 | 950612 988075 | INVALID | |
| 35 | 950612 988076 | INVALID | |
| 36 | 51128 98807 | SCHEDULED | |
| 37 | 51128 98806 | SCHEDULED | |
| 38 | 51128 98805 | SCHEDULED | |

1.8 Using the Include All and Include None Buttons

By selecting the "Include All" button, all of the available columns will automatically be selected which saves the user having to individually select each column they wish to include the report (this may be useful if there are many columns available to select). In the following example the "Include All" button has been pressed. This has automatically selected the only additional column which wasn't already selected for inclusion in the .csv extract.



It is worth noting that any columns with the "Req" (required) field set to "Y" already have the "Inc" (included) check box selected. The "req" column is not updatable via this screen, it's value is set in the corresponding database table.

You may also change the "Req" value - this affects whether the parameter is required when running the report, from here and any other system that allows running of saved ORS reports, such as Calidus Portal or CTL. **Warning:** Changing the value in this field can result in massively inefficient reports, so much care should be taken. Confirm this with your system administrator first.

Having selected the "Include All" button, we can again run the report via the "Create CSV" button and, in the following example, see the addition of an extra column to the extract .csv file.

| ORS_MTS_OWNER_10102503031 [Read-Only] | | | | |
|---------------------------------------|---------------|-----------------|--------|----------|
| | A | B | C | D |
| 1 | Schedule | Order Reference | Status | Customer |
| 2 | 950612 988046 | INVALID | HYGENA | |
| 3 | 950612 988079 | INVALID | HYGENA | |
| 4 | 950612 988048 | INVALID | HYGENA | |
| 5 | 950612 988049 | INVALID | HYGENA | |
| 6 | 950612 988047 | INVALID | HYGENA | |
| 7 | 950612 988078 | INVALID | HYGENA | |
| 8 | 950612 988077 | INVALID | HYGENA | |
| 9 | 950612 988050 | INVALID | HYGENA | |
| 10 | 950612 988051 | INVALID | HYGENA | |
| 11 | 950612 988052 | INVALID | HYGENA | |
| 12 | 950612 988053 | INVALID | HYGENA | |
| 13 | 950612 988054 | INVALID | HYGENA | |
| 14 | 950612 988055 | INVALID | HYGENA | |
| 15 | 950612 988056 | INVALID | HYGENA | |
| 16 | 950612 988057 | INVALID | HYGENA | |
| 17 | 950612 988058 | INVALID | HYGENA | |
| 18 | 950612 988059 | INVALID | HYGENA | |
| 19 | 950612 988060 | INVALID | HYGENA | |
| 20 | 950612 988061 | INVALID | HYGENA | |



If the "Include None" button is selected then all of the fields which don't have the "Req" field set to "Y" will be unchecked and removed from the report extract.

1.9 Using the Copy To User Function

The "Copy to User" button allows the current report to be copied to another user. When the button is pressed a pop-up is shown which allows a user to be selected where the report is to be copied to. The new report name also needs to be entered here.

The screenshot shows a window titled 'Copy To User' with a 'New Report' text field. Below the text field are four buttons: 'Save Selection', 'Copy To User', 'Copy To User', and 'New Report'. A red circle highlights the second 'Copy To User' button.

Selecting the user is done via a list displaying the users where the report can be copied to.

The screenshot shows a list of users. The user 'OBSDJY' is highlighted in blue. A red circle highlights the 'OBSDJY' user.

The new report name should be entered in the field provided. This will then be accessible to the user selected. The information is saved upon pressing return after filling out the new report name.

The screenshot shows the 'Copy To User' dialog box. The 'Copy To User' field contains the name 'OBSDJY' and the 'New Report' field contains the text 'Customer1 copy'. A red circle highlights the 'New Report' field.

If we were now to log onto the system as the user who has had the report copied to (e.g. OBSDJY) we can select the report from the "Saved Reports" list and all the selected column details (restrictions on the order reference column and the sort on the status column) are accessible by the new user (see the following example).

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|----|------|---------|
| LINE | Line No | Line No | N | | | |
| LINE | Prod Type | Prod Type | N | | | |
| LINE | DU Type | DU Type | N | | | |
| LINE | Quantity | Quantity | N | | | |
| HEADER | Schedule | Schedule | Y | | | |
| HEADER | Order Ref | Order Ref | Y | | | |
| HEADER | Status | Status | Y | | | |
| HEADER | Customer | Customer | Y | | | |

1.10 Clear All Selection Function

The "Clear All Selection Criteria" button simply allows the user to clear all of the "From" and "To" selection criteria (if any exists).

1.11 Creating an Order Line Report

As previously stated, the "Orders" report has 3 different levels of report (Header, Line and Items). If we now click the "Refresh" button at the top of the screen (to clear all the existing report details and reset the form) and then select a new report type of "Orders" and a Report Level of "Line", we can see the following details on the form. The order line details have now been added to the existing order header details.

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|----|------|---------|
| LINE | Line No | Line No | N | | | |
| LINE | Prod Type | Prod Type | N | | | |
| LINE | DU Type | DU Type | N | | | |
| LINE | Quantity | Quantity | N | | | |
| HEADER | Schedule | Schedule | Y | | | |
| HEADER | Order Ref | Order Ref | Y | | | |
| HEADER | Status | Status | Y | | | |
| HEADER | Customer | Customer | Y | | | |

Again, we will enter some restrictions on the report (in the order reference field) to restrict the report. See below:

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|------|---------|
| LINE | Line No | Line No | N | | | |
| LINE | Prod Type | Prod Type | N | | | |
| LINE | DU Type | DU Type | N | | | |
| LINE | Quantity | Quantity | N | | | |
| HEADER | Schedule | Schedule | Y | | | |
| HEADER | Order Ref | Order Ref | Y | 999999 | | |
| HEADER | Status | Status | Y | | | |
| HEADER | Customer | Customer | Y | | | |

We will save the report as "orderlines1" by clicking on "Save Selection" and then "Save Report".

Report Name: Save Report



If we were now to run the extract via the "Create CSV" button we would get an extract file similar to the following example. Note that the "Included" order line columns (Line No and DU Type) have been included in the extract file. We didn't include the remaining order line columns (Prod Type and Quantity) so these have not been included.

| ORS_MTS_OWNER_101026091059[1] | | | | | |
|-------------------------------|----------|-----------|---------|---------|---------|
| | A | B | C | D | E |
| 1 | Schedule | Order Ref | Status | Line No | DU Type |
| 2 | 950612 | 988046 | INVALID | 1 | Packs |
| 3 | 950612 | 988047 | INVALID | 1 | Packs |
| 4 | 950612 | 988048 | INVALID | 1 | Packs |
| 5 | 950612 | 988049 | INVALID | 1 | Packs |
| 6 | 950612 | 988050 | INVALID | 1 | Packs |
| 7 | 950612 | 988051 | INVALID | 1 | Packs |
| 8 | 950612 | 988052 | INVALID | 1 | Packs |
| 9 | 950612 | 988053 | INVALID | 1 | Packs |
| 10 | 950612 | 988054 | INVALID | 1 | Packs |
| 11 | 950612 | 988055 | INVALID | 1 | Packs |
| 12 | 950612 | 988056 | INVALID | 1 | Packs |
| 13 | 950612 | 988057 | INVALID | 1 | Packs |
| 14 | 950612 | 988058 | INVALID | 1 | Packs |
| 15 | 950612 | 988059 | INVALID | 1 | Packs |

1.12 Creating an Order Item Report

Next we will look at the Order Items report. If we now click the "Refresh" button and entered new report details of Report Type = "Orders" and Report Level = "Items", we would get a report looking similar to the following example.

Once we have entered the restriction criteria for the new report (e.g. Order Reference 988046 to 988079), we should click "Save Selection" and enter the Report Name of "orderitems1". Finally, click "Save Report" so it can be retrieved later.

Now run the report via the "Create CSV" button and we should see the addition of the order items to the orders extract file (if any exists).



ORS_MTS_OWNER_101026121037 [Read-Only]

| | A | B | C | D | E | F |
|----|----------|-----------|---------|---------|---------|---------|
| 1 | Schedule | Order Ref | Status | Line No | DU Type | Item ID |
| 2 | 950612 | 988066 | INVALID | 1 | Packs | |
| 3 | 950612 | 988078 | INVALID | 1 | Packs | |
| 4 | 950612 | 988069 | INVALID | 1 | Packs | |
| 5 | 950612 | 988067 | INVALID | 1 | Packs | |
| 6 | 950612 | 988050 | INVALID | 1 | Packs | |
| 7 | 950612 | 988063 | INVALID | 1 | Packs | |
| 8 | 950612 | 988074 | INVALID | 1 | Packs | |
| 9 | 950612 | 988047 | INVALID | 1 | Packs | |
| 10 | 950612 | 988079 | INVALID | 1 | Packs | |
| 11 | 950612 | 988071 | INVALID | 1 | Packs | |
| 12 | 950612 | 988073 | INVALID | 1 | Packs | |
| 13 | 950612 | 988065 | INVALID | 1 | Packs | |
| 14 | 950612 | 988068 | INVALID | 1 | Packs | |
| 15 | 950612 | 988057 | INVALID | 1 | Packs | |

1.13 Deleting a Report

By firstly selecting a report (e.g. orderheader1) we can delete the report via the "Delete Report" button.

Once the "Delete Report" button has been pressed, a confirmation message appears to check if the report can actually be deleted.

Oracle Reporting Suite

Report Type: Report Level: Saved Report:

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|--------|---------|
| HEADER | Schedule | Schedule | W | | | |
| HEADER | Order Ref | Order Reference | W | 988048 | 988079 | |
| HEADER | Status | Status | W | | | |
| HEADER | Customer | Customer | W | | | |

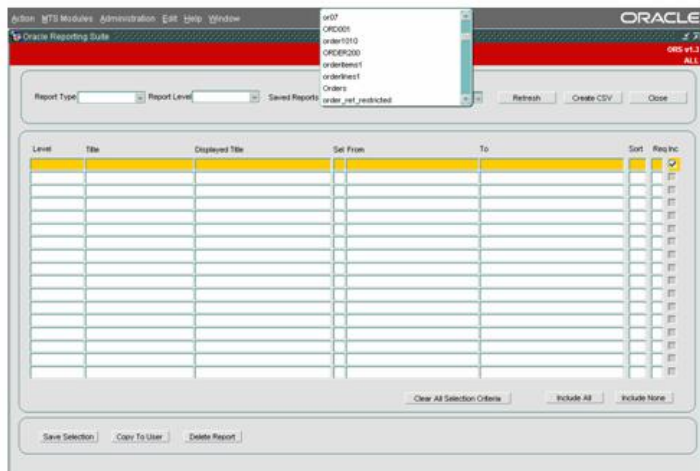
If the "OK" button is selected then the report will be deleted for the current user. If the report has been copied to another user before deletion then this report will still exist for that user after deletion. After the report has been deleted, we can see by trying to select the report via the "Saved Reports" button that the report no longer exists for this user.

Forms

Confirm deletion of report orderheader1?

As can be seen above, the report "orderheader1" is no longer shown in the "Saved Reports" list. If after deletion, there was a requirement to retrieve this report we could log on as the user we copied the original report to in section 2.7.





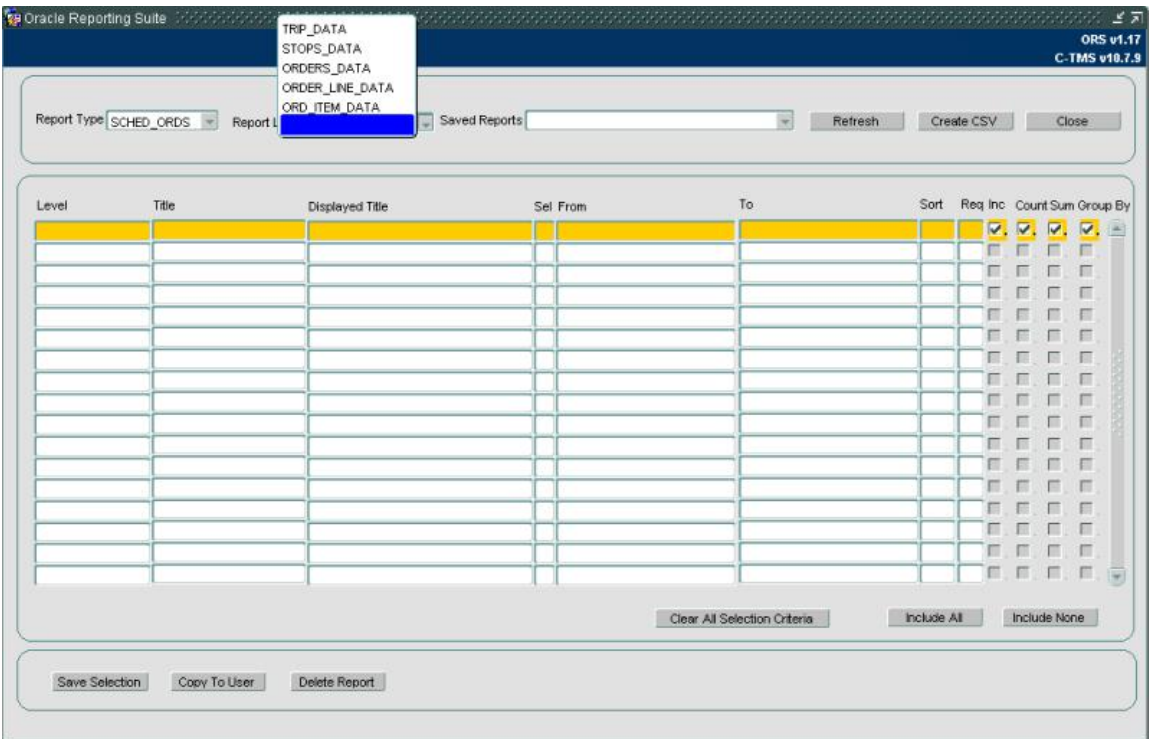
As can be seen above, the report "orderheader1" is no longer shown in the "Saved Reports" list. If after deletion, there was a requirement to retrieve this report we could log on as the user we copied the original report to in section 2.7.

1.14 Count, Sum and Group By

ORS reports allow aggregate functions Count, Sum and Group By.

Note: A system Parameter ORS_SUMMARY controls the display of the Oracle Report suite screen.

When this parameter is set to Y, users are able to group, sum and count information within the report extracts. When this parameter is set to N, the grouping and summary fields will not be available on the screen.



You may only count or sum columns from the lowest level selected. For all other levels, the count and sum will be disabled.

If you choose to select a sum or count, all other columns selected which are not a summary must be selected as a group by. In addition to the group by, the sort order is also required.



Oracle Reporting Suite

Report Type: SCHED_ORDS Report Level: TRIP_DATA Saved Reports: Refresh Create CSV Close

| Level | Title | Displayed Title | Set From | To | Sort | Req | Inc | Count | Sum | Group By |
|-----------|--------------------|--------------------|----------|----|------|-----|-------------------------------------|-------------------------------------|-----|-------------------------------------|
| TRIP_DATA | Trip ID | Trip ID | R | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Schedule | Schedule | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Trip Status | Trip Status | Y | | 1 | N | <input checked="" type="checkbox"/> | | | |
| TRIP_DATA | Transport Mode | Transport Mode | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Owning Depot | Owning Depot | Y | | 2 | N | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> |
| TRIP_DATA | Cost Centre | Cost Centre | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Route Code | Route Code | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Carrier Id | Carrier Id | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Driver ID | Driver ID | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Start Time | Start Time | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | End Time | End Time | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Tractor Id | Tractor Id | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Total Distance | Total Distance | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Total Driver Hours | Total Driver Hours | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Trip Cost | Trip Cost | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Utilisation | Utilisation | Y | | | N | | <input checked="" type="checkbox"/> | | |
| TRIP_DATA | Created date | Created date | R | | | N | | <input checked="" type="checkbox"/> | | |

Clear All Selection Criteria Include All Include None

In the above example, a new report has been created based on the highest report level within SCHED_ORDS, TRIP_DATA. We are able to select from all the columns available within the TRIP_DATA section.

We have chosen to generate a report which counts the number of trips at each status for each owning depot. To generate this correctly, we have identified the trip id as a count field and defined the sort level for Status and owning depot, with the "group by" ticked.

This will produce an extract similar to the following:

```
COUNT(ST.Trip_ID), Trip Status, Owning Depot
1, ACCEPTED, DEPOT1
3, ACCEPTED, DEPOT2
8, COMPLETED, DEPOT2
1, DELETED, DEPOT1
3, DELETED, DEPOT2
2, DELETED, DEPOT3
1, EN-ROUTE, DEPOT1
1, EN-ROUTE, DEPOT2
1, PLANNED, DEPOT1
1, PLANNED, DEPOT2
```

1.15 Scheduling ORS Reports

Details of this can be found here: [EDI - Report/Extract Scheduling](#).

1.16 Further Configuration


The following System Parameters affect this functionality:

| Parameter | Description | Level |
|-----------------------|--|--------|
| ORS_DELIMITER | Oracle reporting suite data field delimiter | SYSTEM |
| ORS_SUMMARY | Allow the summarisation OF ORS reports | SYSTEM |
| ORS_TYPE_DEF_GROUP_BY | List of the ORS types to default group by fields | SYSTEM |
| ORS_TYPE_EXC_GROUP | Exclude ORS types from grouping fields | SYSTEM |



2 ORS Reports List

The following is a list of all available ORS reports.

 **Note:** Not all ORS reports are delivered as standard but can be added to the system.

| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|--------------------|---|---------------|-------------------------|
| 3PL_CARR | 1 | 3PL_CARR | Reports on Carrier and trip assigned to 3rd-party carriers (designated as 3PL) | Transactional | Trip |
| ACCOUNT | 1 | CONTRACTS_OUT | Reports on Accounts and Invoice Requirements set up in the system. | Standing Data | Finance |
| ACC_ACCNT | 1 | ACC_ACCNT | Reports on Account set up in the system | Standing Data | Finance |
| ACC_SRVCS | 1 | ACC_SRVCS | Reports on Account Services set up in the system (services supplied) | Standing Data | Finance |
| ACC_SRVCS | 2 | SLIDING_CHG | Adds Sliding Charges from the services supplied to the report | Standing Data | Finance |
| ASSETS | 1 | DETAIL | Reports on Permanent assets configured in the system. | Standing Data | Asset |
| ASSETS | 2 | HISTORY | Adds the history of events against the assets to the report. | Transactional | Asset |
| AWB | 1 | AIRWAY BILL | Reports on AWBs created through Calidus MCS. | Transactional | Item |
| AWB_CONS | 1 | AWS CONS | Reports on AWBs and Consignments to Shipments | Transactional | Trip |
| CARRIERS | 1 | HEADER | Reports on the Carriers core information set up in the system. | Standing Data | Carrier |
| CARR_ALLOC | 1 | CARRIER ALLOCATION | Reports on Carrier and tendered trip assigned to 3rd-party carriers (designated as 3PL) | Transactional | Trip |
| CARR_CLASS | 1 | CLASSES | Reports on Carrier Rules Commodity Class. | Standing Data | Carrier |
| CARR_COMMS | 1 | COMMODITIES | Reports on Carrier Rules Commodity. | Standing Data | Carrier |
| CARR_DUS | 1 | DUS | Reports on Carrier Du Types | Standing Data | Trip |
| CARR_MANF | 1 | CARR_MANF | Reports the full data from Trip down to Order Lines i.e. manifest data. | Transactional | Trip, Order, Line, Item |
| CARR_PRODS | 1 | PRODUCTS | Reports on Carrier Product Types | Standing Data | Carrier |
| CARR_ROUTE | 1 | ROUTES | Reports on Carrier Routes configured in the system | Standing Data | Carrier |
| CARR_ROUTE | 2 | ROUTE_DETAILS | Adds Carrier Route Services to the report | Standing Data | Carrier |
| CARR_SHIP | 1 | SHIPMENTS | Reports on Carrier Shipment rules | Standing Data | Carrier |
| CONTRACTS | 1 | CONTRACTS | Reports on Contracts configured in the system | Standing Data | Finance |
| CONTRACTS | 2 | TARIFFS | Adds Tariffs to the report | Standing Data | Finance |
| CONTRACTS | 3 | TIERS | Adds Tiers to the report | Standing Data | Finance |
| CONTRACTS | 4 | CHARGES | Adds Charges to the report | Standing Data | Finance |
| CONTRACTS | 5 | CHARGE DETAILS | Adds Charge Details to the report | Standing Data | Finance |
| CONTRACTS | 6 | CONDITITIONS | Adds Charge Conditions to the report | Standing Data | Finance |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|------------------|--|---------------|-------------------|
| CONTRACTS | 7 | VEHICLE | Adds Vehicle to the report | Standing Data | Finance |
| CONT_JRNY | 1 | CONT_JRNY | Reports on Contracts and Tariffs on standard journeys (geographical restrictions) | Standing Data | Finance |
| CUSTOMERS | 1 | CUSTOMERS | Reports on Customers core information configured in the system. | Standing Data | Customer |
| CUST_CHRGS | 1 | CUST_CHRGS | Reports on Customer Charges configured in the system for a customer. | Standing Data | Customer |
| CUST_COST | 1 | CUST_COST | Reports on Customer Cost Plus configured in the system for a customer. | Standing Data | Customer |
| CUST_DATA | 1 | CUST_DATA | Reports on Customer Cut-offs configured in the system for a customer. | Standing Data | Customer |
| CUST_FUEL | 1 | CUST_FUEL | Reports on Customer Fuel Surcharges configured in the system for a customer. | Standing Data | Customer/Finance |
| CUST_FUELC | 1 | CUST_FUELC | Reports on Customer Fuel Surcharges configured in the system for a customer. | Standing Data | Customer/Finance |
| CUST_PAIN | 1 | CUST_PAIN | Reports on Customer Pain/Gain rules configured in the system for a customer. | Standing Data | Customer |
| CUST_PREFS | 1 | CUST_PREFS | Reports on Customer Prefs configured in the system for a customer. | Standing Data | Customer |
| CUST_SCHED | 1 | CUST_SCHED | Reports on Customer Schedule Engine Thresholds configured in the system for a customer. | Standing Data | Customer |
| CUST_SEC | 1 | CUST_SEC | Reports on Customer Secure Transport configured in the system for a customer. | Standing Data | Customer |
| CUST_SEC_C | 1 | CUST_SEC_C | Reports on Customer Security configured in the system for a customer. | Standing Data | Customer |
| DEL_TIMES | 1 | MORNING-DELTIMES | A "Morning Report", showing Delivery Times from trips executed. | Transactional | Trip, Item |
| DEL_TRIPS | 1 | DEL_TRIPS_ORD | Reports on Trips and Trip Stops and Orders. | Transactional | Trip, Stop, Order |
| DEL_TRIPS | 2 | DEL_LINE_DATA | Adds Order Lines to the report. | Transactional | Line |
| DEL_TRIPS | 3 | DEL_ITEM_DATA | Adds Order Items to the report. | Transactional | Item |
| DOOD_RPT | 1 | STANDARD | Day out of Days report for Lane orders. | Transactional | Trip |
| DRIVERS | 1 | HEADER | Reports on Drivers/Crew configured in the system. | Standing Data | Resource |
| DU_TYPES | 1 | DU_TYPES | Reports on DU types configured in the system | Standing Data | Resource |
| EX_CARRIER | 1 | HEADER | Reports on the Carriers core information set up in the system. | Standing Data | Carrier |
| EX_HAUL | 1 | HEADER | Reports on the Haulage Activity for executed trips (Load/Unload) | Transactional | Trip, Stop |
| EX_LOC | 1 | HEADER | Reports on the Locations set up in the system, and the usage (which Customer/Group they "belong" to) | Standing Data | Geographical |
| EX_ORDHEAD | 1 | HEADER | Reports on Orders, Locations and Contacts. | Transactional | Order |
| EX_ORDHEAD | 2 | ORD_ITEM_DATA | Adds Items to the report | Transactional | Item |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|--------------------|---|---------------|---------------|
| EX_ORDITEM | 1 | HEADER | Reports on Order Items on orders | Transactional | Item |
| EX_ORDLINE | 1 | HEADER | Reports on Order Lines on orders | Transactional | Line |
| EX_PERSON | 1 | HEADER | Reports on Drivers/Crew configured in the system. | Standing Data | Resource |
| EX_TRACTOR | 1 | HEADER | Reports on Tractors or Vehicles configured in the system. | Standing Data | Resource |
| EX_TRAILER | 1 | HEADER | Reports on Trailers or Vehicles configured in the system. | Standing Data | Resource |
| EX_TRIP | 1 | HEADER | Reports on Trip Header information. | Transactional | Trip |
| EX_TRPSTOP | 1 | HEADER | Reports on Trips and Stops information. | Transactional | Trip, Stop |
| FAILED | 1 | MORNING-FAILED | A "Morning Report", showing Failed items i.e. items not delivered. | Transactional | Trip, Item |
| FIX_ROUTE | 1 | ROUTES | Reports on Fixed Routes configured in the system. | Standing Data | Planning |
| FIX_ROUTE | 2 | ROUTE_STOPS | Reports on Fixed Routes and Stops configured in the system. | Standing Data | Planning |
| HAULIER | 1 | SCH_TRIP | Reports on Trips and Stops information. | Transactional | Trip, Stop |
| HELD | 1 | MORNING-HELD | A "Morning Report", showing failed items that are to be held at the outbase for redelivery. | Transactional | Trip, Item |
| IMP_DECODE | 1 | IMP_DECODE | Reports on any configured import/export decode tables and data set up in the system. | Standing Data | Import |
| INTERFACE | 1 | INTERFACE | Reports on interface triggered events. | Transactional | EDI |
| INT_XML | 2 | DETAIL | Adds detail information to the report. | Transactional | EDI |
| INV_TYPE | 1 | INVOICES_DATA | Reports on Invoices generated for accounts. | Transactional | Finance |
| INV_TYPE | 2 | PAYMENTS_DATA | Adds Payment data included on an invoice to the report. | Transactional | Finance |
| LABOUR | 1 | SCH_ORD_LABOUR | Reports on Labour for orders. | Transactional | Order |
| LOCKED_OUT | 1 | LOCKED_OUT | Reports on Payments generated against Orders where the status is F or A | Transactional | Finance |
| MCS_DTLS | 1 | MCS_DETAILS | Reports on Items scanned or to be scanned through Calidus MCS | Transactional | MCS |
| NAVTEQ | 1 | HEADER | Reports on Geocoding and Route Time/Distance calculations called from external systems. | Standing Data | Geographical |
| NETWORK | 1 | LOCATIONS | Reports on Network Locations in the system, for time and distance calculations | Standing Data | Geographical |
| NETWORK | 2 | DRIVE_TIME_DETAILS | Adds drive time details from that location to other locations to the report. | Standing Data | Geographical |
| NON_CONF | 1 | HEADER | Reports on Order Non-conformance Information . | Transactional | Order |
| NON_CONF | 2 | LINE | Adds Lines to the report | Transactional | Line |
| NON_CONF | 3 | ITEMS | Adds Items to the report | Transactional | Item |
| NON_CONF | 4 | NON_CONFORM | Adds non-conformance/reasons information to the report | Transactional | Item History |
| O/S SCANS | 1 | MISSING_SCANS | Reports on items not scanned through Calidus MCS. | Transactional | MCS |
| OPEN_AWB | 1 | V_MCS_OPEN_AWB | Reports on Open AWBs through Calidus MCS | Transactional | MCS |
| ORDERS | 1 | HEADER | Reports on Order Header Information | Transactional | Order |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|-------------------|--|---------------|---------------|
| ORDERS | 2 | LINE | Adds Lines to the report | Transactional | Line |
| ORDERS | 3 | ITEMS | Adds Items to the report | Transactional | Item |
| ORDER_ITEM | 1 | ORD_ITEM_DATA | Reports on Order Items on orders (including order information relating to the From and To locations) | Transactional | Item |
| ORDLN_TYPE | 1 | ORDER_LINE_DATA | Reports on Order Lines, including Location and Customer information. | Transactional | Line |
| ORD_IN_INV | 1 | ORD_IN_INV_DATA | Bespoke order invoice report | Transactional | Finance |
| ORD_OFFSET | 1 | ORDER_OFFSETS | Reports on Location time offsets configured in the system. | Standing Data | Geographical |
| ORD_STATS | 1 | SCH_ORDER_STATS | Reports on Order Stats - summary report of orders created, delivered or for delivery. | Transactional | Order |
| ORD_TYPE | 1 | ORDERS_DATA | Reports on Orders (including order information relating to the From and To locations) | Transactional | Order |
| OWN_CHRGs | 1 | OWN_CHARGES | Reports on Own Package Charges | Standing Data | Finance |
| PALLETS | 1 | PALLETS | Reports on Shipment Pallets created in Calidus MCS | Transactional | MCS |
| PALLETS | 2 | PALLET_ITEM | Adds Items to the report | Transactional | MCS |
| PALL_ITEM | 1 | PALLET_ITEM | Reports on Shipment Pallet Items created in Calidus MCS | Transactional | MCS |
| PAYMENTS | 1 | PAYMENTS_DATA | Reports on generated payments of all types | Transactional | Finance |
| PAYMENTS | 2 | EVENT_DETAILS | Adds event details to the report | Transactional | Finance |
| RE-DELIVER | 1 | SCH_ORD_RE_DEL | Reports on history of rebooked orders. | Transactional | Order |
| REASONS | 1 | ORD_ITEM_DATA | Reports on Order Item non-confirmances | Transactional | Item History |
| REASONS | 2 | ORD_ITEM_REASON | Adds Reason Code Information to the report | Transactional | Item History |
| RES_EQUIP | 1 | SCH_ORD_RES_EQUIP | Reports on Order Equipment Requirements. | Transactional | Order |
| RPE_CUST | 1 | RPE_CUST | Bespoke customer RPE data. | Standing Data | Resource |
| RTE_COSTS | 1 | RTE_COSTS | Reports on fixed costs against routes | Standing Data | Planning |
| RULES | 1 | RULES | Reports on Schedule Rules configured in the system. | Standing Data | Planning |
| SCANS | 1 | TRIP | Reports on Trips | Transactional | Trip |
| SCANS | 2 | STOP | Adds Stop information to the report. | Transactional | Stop |
| SCANS | 3 | ORDER | Adds Order and Item information to the report. | Transactional | Order, Items |
| SCANS | 4 | ASSET | Adds Permanent Asset information to the report. | Transactional | Asset |
| SCANS | 5 | REASON | Adds non-conformance/reasons information to the report | Transactional | Reasons |
| SCHED_ORD2 | 1 | TRIP_DATA | Reports on Trip, Stop and Location information. | Transactional | Trip |
| SCHED_ORD2 | 2 | STOPS_DATA | Adds Haulage Activity to the report | Transactional | Stop |
| SCHED_ORD2 | 3 | ORDERS_DATA | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| SCHED_ORD2 | 4 | ORDER_LINE_DATA | Adds order line information to the report. | Transactional | Line |
| SCHED_ORD2 | 5 | ORD_ITEM_DATA | Adds order item information to the report. | Transactional | Item |
| SCHED_ORDS | 1 | TRIP_DATA | | Transactional | Trip |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|-----------------|--|---------------|------------------|
| | | | Reports on Trip, Stop and Location information. | | |
| SCHED_ORDS | 2 | STOPS_DATA | Adds Haulage Activity to the report | Transactional | Stop |
| SCHED_ORDS | 3 | ORDERS_DATA | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| SCHED_ORDS | 4 | ORDER_LINE_DATA | Adds order line information to the report. | Transactional | Line |
| SCHED_ORDS | 5 | ORD_ITEM_DATA | Adds order item information to the report. | Transactional | Item |
| SRVCS_CAPT | 1 | SRVCS_CAPT | Reports on Account Service Rates set up in the system. | Standing Data | Finance |
| STD_ORDS | 1 | ORDER_AND_TRIP | Reports on Order Header Information | Transactional | Order |
| STD_ORDS | 2 | LINE | Adds Lines to the report. | Transactional | Line |
| STD_ORDS | 3 | ITEM | Adds Items to the report. | Transactional | Item |
| STD_ORDS | 4 | FINANCE | Adds Finance information to the report. | Transactional | Finance |
| STD_TIMES | 1 | ORDER_AND_TIMES | Reports on order, vehicle and times. | Transactional | Order |
| STD_TRIPS | 1 | TRIP | Reports on Trip, Stop and Location information. | Transactional | Trip |
| STD_TRIPS | 2 | STOPS | Adds Haulage Activity to the report | Transactional | Stop |
| STD_TRIPS | 3 | ORDERS | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| STD_TRIPS | 4 | ORDER_LINE | Adds order line information to the report. | Transactional | Line |
| STOPS | 1 | STOP_DATA | Reports on Trip, Stop, Location and Haulage Activity. | Transactional | Trip, Stop |
| STORAGE | 1 | SCH_ORD_STORE | Bespoke white glove report. | Transactional | Order |
| SUCCESS | 1 | MORNING-SUCCESS | A "Morning Report" showing successful collections/Deliveries. | Transactional | Order |
| TRACTORS | 1 | HEADER | Reports on Tractors or Vehicles configured in the system. | Standing Data | Resource |
| TRAILERS | 1 | HEADER | Reports on Trailers or Vehicles configured in the system. | Standing Data | Resource |
| TRIP | 1 | HEADER | Reports on Trips | Transactional | Trip |
| TRIP_SCANS | 1 | TRIP_SCANS | Reports on Items on Trips | Transactional | Trip Scans |
| TRIPS | 1 | TRIP | Reports on Trip, Stop and Location information. | Transactional | Trip |
| TRIPS | 2 | STOPS | Adds Stop information to the report | Transactional | Stop |
| TRIPS | 3 | ORDERS | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| TRIPS | 4 | ORDER_LINE | Adds order line information to the report. | Transactional | Line |
| TRIP_LOCS | 1 | TRIP_DATA | Reports on Trip Stop and Locations, for Loading and Unloading activity | Transactional | Trip |
| TRIP_TYPE | 1 | TRIP_DATA | Reports on trip data | Transactional | Trip |
| TRIP_TYPE | 1 | TRIP_TYPE | Summary of 3PL assigned trips | Transactional | Trip |
| TRL_TYPES | 1 | HEADER | Reports on Trailer Types | Standing Data | Resource |
| TYREKEYCUS | 1 | PERIOD | Fleet Maintenance report | Transactional | Fleet Management |
| TYREKEYGRP | 1 | PERIOD | Fleet Maintenance report | Transactional | Fleet Management |
| TYRE_INSP | 1 | ORDER_AND_TRIP | Fleet Maintenance report | Transactional | Trip, Order |
| TYRE_INSP | 2 | VEHICLE_TYRES | Fleet Maintenance report | Transactional | Vehicle |
| TYRE_INSP | 3 | INSPECTIONS | Fleet Maintenance report | Transactional | Inspections |
| TYRE_ORDS | 1 | ORDER_AND_TRIP | Fleet Maintenance report | Transactional | Trip, Order |
| TYRE_ORDS | 2 | LINE | Fleet Maintenance report | Transactional | Line |
| TYRE_ORDS | 3 | ITEM | Fleet Maintenance report | Transactional | Item |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|---------|---------------------------------------|---------------|---------------|
| TYRE_ORDS | 4 | FINANCE | Fleet Maintenance report | Transactional | Finance |
| VOLUMETRIC | 1 | DATA | Product vehicle volumetric data | Standing Data | Product |
| ZONE | 1 | ZONE | Reports on Zones set up in the system | Standing Data | Geographical |

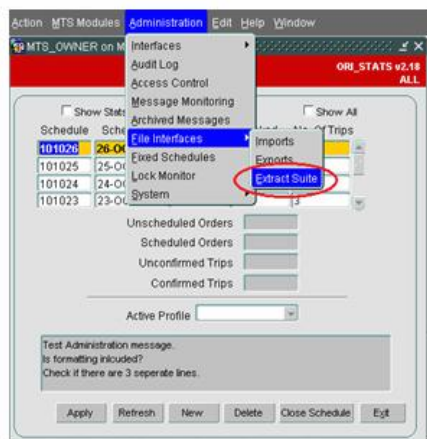


3 ORS

The ORS Reporting Suite is based on a number of key database tables in order to allow the user a degree of flexibility in extracting the data they require. The data is extracted into the .csv format which can be viewed in Microsoft Excel.

3.1 Accessing the Extract Suite

To gain access to the Reporting Suite, select "Administration", "File Interfaces" and "Extract Suite" (see below).



3.2 Creating a New Report

The following example details the steps required to create a new report from scratch based on "Orders".

A [list](#) of all available ORS reports is available on the Assist pages.

The "Orders" report has 3 report levels (Header, Line, Items) , each allowing a different amount of information to be displayed and manipulated by the user. The table below shows the data available at each level. If Report Level Items (3) is selected then all levels above that (Line(2) and Header (1)) will also be extracted.

| Report Type | Report Level | Report Level Description | Available Columns |
|-------------|--------------|--------------------------|-------------------|
| ORDERS | 1 | HEADER | sched_name |
| ORDERS | 1 | HEADER | oms_ref |
| ORDERS | 1 | HEADER | status |
| ORDERS | 1 | HEADER | customer |
| ORDERS | 2 | LINE | line_no |
| ORDERS | 2 | LINE | product_type |
| ORDERS | 2 | LINE | DU_type |
| ORDERS | 2 | LINE | Quantity |
| ORDERS | 3 | ITEMS | item_identifier |
| ORDERS | 3 | ITEMS | qty_ordererd |

We will begin by selecting a Report Type of "Orders" and a Report Level of "Header" as shown below.



If we select a Report Type of "Orders" and "Report Level" of Header we see the following columns shown on the form.



| Level | Title | Displayed Title | Sel | From | To | Sort | Req Inc |
|--------|-----------|-----------------|-----|------|----|------|---------|
| HEADER | Schedule | Schedule | Y | | | | |
| HEADER | Order Ref | Order Ref | R | | | | |
| HEADER | Status | Status | Y | | | | |
| HEADER | Customer | Customer | Y | | | | |

We could run this report as it stands but it is advisable to firstly restrict the report in some way otherwise the system could try to retrieve thousands of order records which will potentially take a long time.

3.3 Restricting the Report

In this example, we will restrict the report by entering a restriction of the "order number" from 988046 to 988079. This is possible because the "Sel" column is set to "R" (Range Selection). When the column is set to "Y" you can enter a value in the "From" column only. When the column is set to "N", no restrictions can be set (see the following example).

| Level | Title | Displayed Title | Sel | From | To | Sort | Req Inc |
|--------|-----------|-----------------|-----|--------|--------|------|---------|
| HEADER | Schedule | Schedule | Y | | | | |
| HEADER | Order Ref | Order Ref | R | 988046 | 988079 | | |
| HEADER | Status | Status | Y | | | | |
| HEADER | Customer | Customer | Y | | | | |

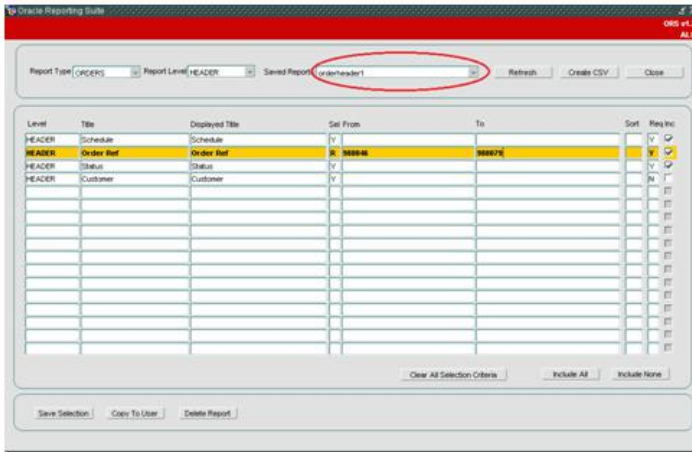
3.4 Saving the Report

When the report restriction has been decided, the user is required to click on the "Save Selection" button at the bottom left of the screen. This would display a pop-up as shown below:

A report name needs to be entered so in this example we will enter "orderheader1" (see below).

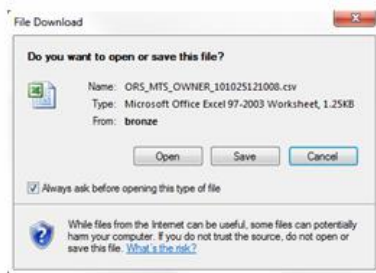
Once the "Save Report" button is clicked, this report is saved and can be retrieved at a later date and a .csv extract file produced. Having clicked the "Save Report" button, the report name is submitted to the "Saved Reports" list of values at the top of the screen:





3.5 Creating the CSV Extract

Now we are ready to produce the extract .csv file. To do this, simply select the "Create CSV" button (having firstly done the steps in sections 2.1 and 2.2). The user will be shown the following confirmation pop-up, asking whether to open, save or cancel the extract. In this example we will select "Open".



Once the "Open" option has been selected, Microsoft Excel will open and display the contents of the .csv file (see the following .csv extract example). The time taken to do this depends on the number of records to be retrieved by the Extract Suite screen.

| ORS_MTS_OWNER_101025121008 | | | | |
|----------------------------|----------|-----------|---------|---|
| | A | B | C | D |
| 1 | Schedule | Order Ref | Status | |
| 2 | 950612 | 988046 | INVALID | |
| 3 | 950612 | 988047 | INVALID | |
| 4 | 950612 | 988048 | INVALID | |
| 5 | 950612 | 988049 | INVALID | |
| 6 | 950612 | 988050 | INVALID | |
| 7 | 950612 | 988051 | INVALID | |
| 8 | 950612 | 988052 | INVALID | |
| 9 | 950612 | 988053 | INVALID | |
| 10 | 950612 | 988054 | INVALID | |
| 11 | 950612 | 988055 | INVALID | |
| 12 | 950612 | 988056 | INVALID | |
| 13 | 950612 | 988057 | INVALID | |
| 14 | 950612 | 988058 | INVALID | |
| 15 | 950612 | 988059 | INVALID | |
| 16 | 950612 | 988060 | INVALID | |
| 17 | 950612 | 988061 | INVALID | |
| 18 | 950612 | 988062 | INVALID | |
| 19 | 950612 | 988063 | INVALID | |
| 20 | 950612 | 988064 | INVALID | |
| 21 | 950612 | 988065 | INVALID | |
| 22 | 950612 | 988066 | INVALID | |
| 23 | 950612 | 988067 | INVALID | |
| 24 | 950612 | 988068 | INVALID | |
| 25 | 950612 | 988069 | INVALID | |



As can be seen, the 3 selected columns from the screen (Schedule, Order Ref and Status) are included in the extract file.

3.6 Amending the Report Titles

If we wished to change the Excel column titles, we need to change the "Displayed Title" on the form. In the following example, we have amended the Displayed Title from "Order Ref" to "Order Reference".

The screenshot shows the Oracle Reporting Suite interface. At the top, there are dropdown menus for 'Report Type' (set to ORDERS), 'Report Level' (set to HEADER), and 'Saved Reports' (set to orderheader1). Below these are buttons for 'Refresh', 'Create CSV', and 'Close'. The main table has columns: Level, Title, Displayed Title, Set From, To, Sort, and Req Inc. The 'Order Ref' row is highlighted in yellow, and its 'Displayed Title' is 'Order Reference', which is circled in red.

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|--------|---------|
| HEADER | Schedule | Schedule | Y | | | Y |
| HEADER | Order Ref | Order Reference | Y | 988046 | 988079 | Y |
| HEADER | Status | Status | Y | | | Y |
| HEADER | Customer | Customer | Y | | | Y |

Having amended the Displayed Title, by clicking the "Create CSV" button, we can now see the amended column heading in the .csv Excel extract file.

The screenshot shows an Excel spreadsheet titled 'ORS_MTS_OWNER_101026111059 [Read-Only]'. The spreadsheet has three columns: A, B, and C. Column A is 'Schedule', Column B is 'Order Reference', and Column C is 'Status'. The data rows show various order numbers and their status, all marked as 'INVALID'.

| | A | B | C |
|----|----------|-----------------|---------|
| 1 | Schedule | Order Reference | Status |
| 2 | 950612 | 988046 | INVALID |
| 3 | 950612 | 988079 | INVALID |
| 4 | 950612 | 988048 | INVALID |
| 5 | 950612 | 988049 | INVALID |
| 6 | 950612 | 988047 | INVALID |
| 7 | 950612 | 988078 | INVALID |
| 8 | 950612 | 988077 | INVALID |
| 9 | 950612 | 988050 | INVALID |
| 10 | 950612 | 988051 | INVALID |
| 11 | 950612 | 988052 | INVALID |
| 12 | 950612 | 988053 | INVALID |
| 13 | 950612 | 988054 | INVALID |
| 14 | 950612 | 988055 | INVALID |
| 15 | 950612 | 988056 | INVALID |
| 16 | 950612 | 988057 | INVALID |

3.7 Sorting Report Columns

There is also the option to sort the output by entering a sort order into the "Sort" column on the form (see below). Further sorts can be done by entering 2, 3 etc.

The screenshot shows the Oracle Reporting Suite interface. The 'Status' row is highlighted in yellow, and its 'Sort' value is '1', which is circled in red.

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|--------|---------|
| HEADER | Schedule | Schedule | Y | | | Y |
| HEADER | Order Ref | Order Reference | Y | 988046 | 988079 | Y |
| HEADER | Status | Status | Y | | 1 | Y |
| HEADER | Customer | Customer | Y | | | Y |

As can now be seen, the Status column is now sorted alphabetically in the .csv Excel extract file.

| | | | |
|----|---------------|-----------|--|
| 28 | 950612 988069 | INVALID | |
| 29 | 950612 988070 | INVALID | |
| 30 | 950612 988071 | INVALID | |
| 31 | 950612 988072 | INVALID | |
| 32 | 950612 988073 | INVALID | |
| 33 | 950612 988074 | INVALID | |
| 34 | 950612 988075 | INVALID | |
| 35 | 950612 988076 | INVALID | |
| 36 | 51128 98807 | SCHEDULED | |
| 37 | 51128 98806 | SCHEDULED | |
| 38 | 51128 98805 | SCHEDULED | |

3.8 Using the Include All and Include None Buttons

By selecting the "Include All" button, all of the available columns will automatically be selected which saves the user having to individually select each column they wish to include the report (this may be useful if there are many columns available to select). In the following example the "Include All" button has been pressed. This has automatically selected the only additional column which wasn't already selected for inclusion in the .csv extract.

The screenshot shows the Oracle Reporting Suite window. At the top, there are dropdowns for 'Report Type' (set to 'ORDERS'), 'Report Level' (set to 'HEADER'), and 'Saved Reports' (set to 'orderheader1'). Below these are buttons for 'Refresh', 'Create CSV', and 'Close'. The main area is a table with columns: Level, Title, Displayed Title, Set From, To, Sort, and Req Inc. The table lists various report levels like 'Schedule', 'Order Ref', 'Status', and 'Customer'. The 'Req Inc' column has checkboxes. At the bottom, there are buttons for 'Clear All Selection Criteria', 'Include All' (circled in red), and 'Include None'. There are also buttons for 'Save Selection', 'Copy To User', and 'Delete Report'.

It is worth noting that any columns with the "Req" (required) field set to "Y" already have the "Inc" (included) check box selected. The "req" column is not updatable via this screen, it's value is set in the corresponding database table.

You may also change the "Req" value - this affects whether the parameter is required when running the report, from here and any other system that allows running of saved ORS reports, such as Calidus Portal or CTL. **Warning:** Changing the value in this field can result in massively inefficient reports, so much care should be taken. Confirm this with your system administrator first.

Having selected the "Include All" button, we can again run the report via the "Create CSV" button and, in the following example, see the addition of an extra column to the extract .csv file.

| ORS_MTS_OWNER_10102503031 [Read-Only] | | | |
|---------------------------------------|---------------|-----------------|-----------------|
| A | B | C | D |
| 1 | Schedule | Order Reference | Status Customer |
| 2 | 950612 988046 | INVALID | HYGENA |
| 3 | 950612 988079 | INVALID | HYGENA |
| 4 | 950612 988048 | INVALID | HYGENA |
| 5 | 950612 988049 | INVALID | HYGENA |
| 6 | 950612 988047 | INVALID | HYGENA |
| 7 | 950612 988078 | INVALID | HYGENA |
| 8 | 950612 988077 | INVALID | HYGENA |
| 9 | 950612 988050 | INVALID | HYGENA |
| 10 | 950612 988051 | INVALID | HYGENA |
| 11 | 950612 988052 | INVALID | HYGENA |
| 12 | 950612 988053 | INVALID | HYGENA |
| 13 | 950612 988054 | INVALID | HYGENA |
| 14 | 950612 988055 | INVALID | HYGENA |
| 15 | 950612 988056 | INVALID | HYGENA |
| 16 | 950612 988057 | INVALID | HYGENA |
| 17 | 950612 988058 | INVALID | HYGENA |
| 18 | 950612 988059 | INVALID | HYGENA |
| 19 | 950612 988060 | INVALID | HYGENA |
| 20 | 950612 988061 | INVALID | HYGENA |



If the "Include None" button is selected then all of the fields which don't have the "Req" field set to "Y" will be unchecked and removed from the report extract.

3.9 Using the Copy To User Function

The "Copy to User" button allows the current report to be copied to another user. When the button is pressed a pop-up is shown which allows a user to be selected where the report is to be copied to. The new report name also needs to be entered here.

[illegible]

Selecting the user is done via a list displaying the users where the report can be copied to.

The new report name should be entered in the field provided. This will then be accessible to the user selected. The information is saved upon pressing return after filling out the new report name.

Save Selection Copy To User Copy to User New Report **or** **header 1 copy**

If we were now to log onto the system as the user who has had the report copied to (e.g. OBSDJY) we can select the report from the "Saved Reports" list and all the selected column details (restrictions on the order reference column and the sort on the status column) are accessible by the new user (see the following example).



| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|----|------|---------|
| LINE | Line No | Line No | N | | | |
| LINE | Prod Type | Prod Type | N | | | |
| LINE | DU Type | DU Type | N | | | |
| LINE | Quantity | Quantity | N | | | |
| HEADER | Schedule | Schedule | Y | | | |
| HEADER | Order Ref | Order Ref | Y | | | |
| HEADER | Status | Status | Y | | | |
| HEADER | Customer | Customer | Y | | | |

3.10 Clear All Selection Function

The "Clear All Selection Criteria" button simply allows the user to clear all of the "From" and "To" selection criteria (if any exists).

3.11 Creating an Order Line Report

As previously stated, the "Orders" report has 3 different levels of report (Header, Line and Items). If we now click the "Refresh" button at the top of the screen (to clear all the existing report details and reset the form) and then select a new report type of "Orders" and a Report Level of "Line", we can see the following details on the form. The order line details have now been added to the existing order header details.

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|----|------|---------|
| LINE | Line No | Line No | N | | | |
| LINE | Prod Type | Prod Type | N | | | |
| LINE | DU Type | DU Type | N | | | |
| LINE | Quantity | Quantity | N | | | |
| HEADER | Schedule | Schedule | Y | | | |
| HEADER | Order Ref | Order Ref | Y | | | |
| HEADER | Status | Status | Y | | | |
| HEADER | Customer | Customer | Y | | | |

Again, we will enter some restrictions on the report (in the order reference field) to restrict the report. See below:

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|------|---------|
| LINE | Line No | Line No | N | | | |
| LINE | Prod Type | Prod Type | N | | | |
| LINE | DU Type | DU Type | N | | | |
| LINE | Quantity | Quantity | N | | | |
| HEADER | Schedule | Schedule | Y | | | |
| HEADER | Order Ref | Order Ref | Y | 999999 | | |
| HEADER | Status | Status | Y | | | |
| HEADER | Customer | Customer | Y | | | |

We will save the report as "orderlines1" by clicking on "Save Selection" and then "Save Report".

Report Name: Save Report



If we were now to run the extract via the "Create CSV" button we would get an extract file similar to the following example. Note that the "Included" order line columns (Line No and DU Type) have been included in the extract file. We didn't include the remaining order line columns (Prod Type and Quantity) so these have not been included.

| ORS_MTS_OWNER_101026091059[1] | | | | | |
|-------------------------------|----------|-----------|---------|---------|---------|
| | A | B | C | D | E |
| 1 | Schedule | Order Ref | Status | Line No | DU Type |
| 2 | 950612 | 988046 | INVALID | 1 | Packs |
| 3 | 950612 | 988047 | INVALID | 1 | Packs |
| 4 | 950612 | 988048 | INVALID | 1 | Packs |
| 5 | 950612 | 988049 | INVALID | 1 | Packs |
| 6 | 950612 | 988050 | INVALID | 1 | Packs |
| 7 | 950612 | 988051 | INVALID | 1 | Packs |
| 8 | 950612 | 988052 | INVALID | 1 | Packs |
| 9 | 950612 | 988053 | INVALID | 1 | Packs |
| 10 | 950612 | 988054 | INVALID | 1 | Packs |
| 11 | 950612 | 988055 | INVALID | 1 | Packs |
| 12 | 950612 | 988056 | INVALID | 1 | Packs |
| 13 | 950612 | 988057 | INVALID | 1 | Packs |
| 14 | 950612 | 988058 | INVALID | 1 | Packs |
| 15 | 950612 | 988059 | INVALID | 1 | Packs |

3.12 Creating an Order Item Report

Next we will look at the Order Items report. If we now click the "Refresh" button and entered new report details of Report Type = "Orders" and Report Level = "Items", we would get a report looking similar to the following example.

Once we have entered the restriction criteria for the new report (e.g. Order Reference 988046 to 988079), we should click "Save Selection" and enter the Report Name of "orderitems1". Finally, click "Save Report" so it can be retrieved later.

Now run the report via the "Create CSV" button and we should see the addition of the order items to the orders extract file (if any exists).



ORS_MTS_OWNER_101026121037 [Read-Only]

| | A | B | C | D | E | F |
|----|----------|-----------|---------|---------|---------|---------|
| 1 | Schedule | Order Ref | Status | Line No | DU Type | Item ID |
| 2 | 950612 | 988066 | INVALID | 1 | Packs | |
| 3 | 950612 | 988078 | INVALID | 1 | Packs | |
| 4 | 950612 | 988069 | INVALID | 1 | Packs | |
| 5 | 950612 | 988067 | INVALID | 1 | Packs | |
| 6 | 950612 | 988050 | INVALID | 1 | Packs | |
| 7 | 950612 | 988063 | INVALID | 1 | Packs | |
| 8 | 950612 | 988074 | INVALID | 1 | Packs | |
| 9 | 950612 | 988047 | INVALID | 1 | Packs | |
| 10 | 950612 | 988079 | INVALID | 1 | Packs | |
| 11 | 950612 | 988071 | INVALID | 1 | Packs | |
| 12 | 950612 | 988073 | INVALID | 1 | Packs | |
| 13 | 950612 | 988065 | INVALID | 1 | Packs | |
| 14 | 950612 | 988068 | INVALID | 1 | Packs | |
| 15 | 950612 | 988057 | INVALID | 1 | Packs | |

3.13 Deleting a Report

By firstly selecting a report (e.g. orderheader1) we can delete the report via the "Delete Report" button.

Once the "Delete Report" button has been pressed, a confirmation message appears to check if the report can actually be deleted.

Oracle Reporting Suite

Report Type: ORDERS Report Level: HEADER Saved Report: orderheader1 OK Refresh Create CSV Close

| Level | Title | Displayed Title | Set From | To | Sort | Req Inc |
|--------|-----------|-----------------|----------|--------|--------|---------|
| HEADER | Schedule | Schedule | W | | | |
| HEADER | Order Ref | Order Reference | W | 988048 | 988079 | |
| HEADER | Status | Status | W | | | |
| HEADER | Customer | Customer | W | | | |

Clear All Selection Criteria Include All Include None

Save Selection Copy To User **Delete Report**

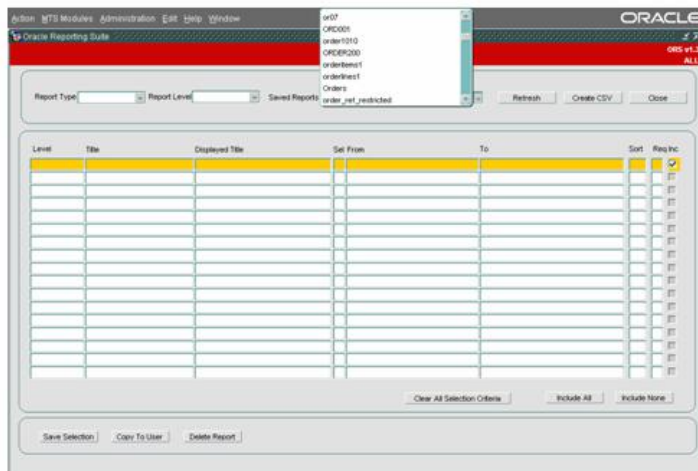
If the "OK" button is selected then the report will be deleted for the current user. If the report has been copied to another user before deletion then this report will still exist for that user after deletion. After the report has been deleted, we can see by trying to select the report via the "Saved Reports" button that the report no longer exists for this user.

Confirm deletion of report orderheader1?

OK Cancel

As can be seen above, the report "orderheader1" is no longer shown in the "Saved Reports" list. If after deletion, there was a requirement to retrieve this report we could log on as the user we copied the original report to in section 2.7.





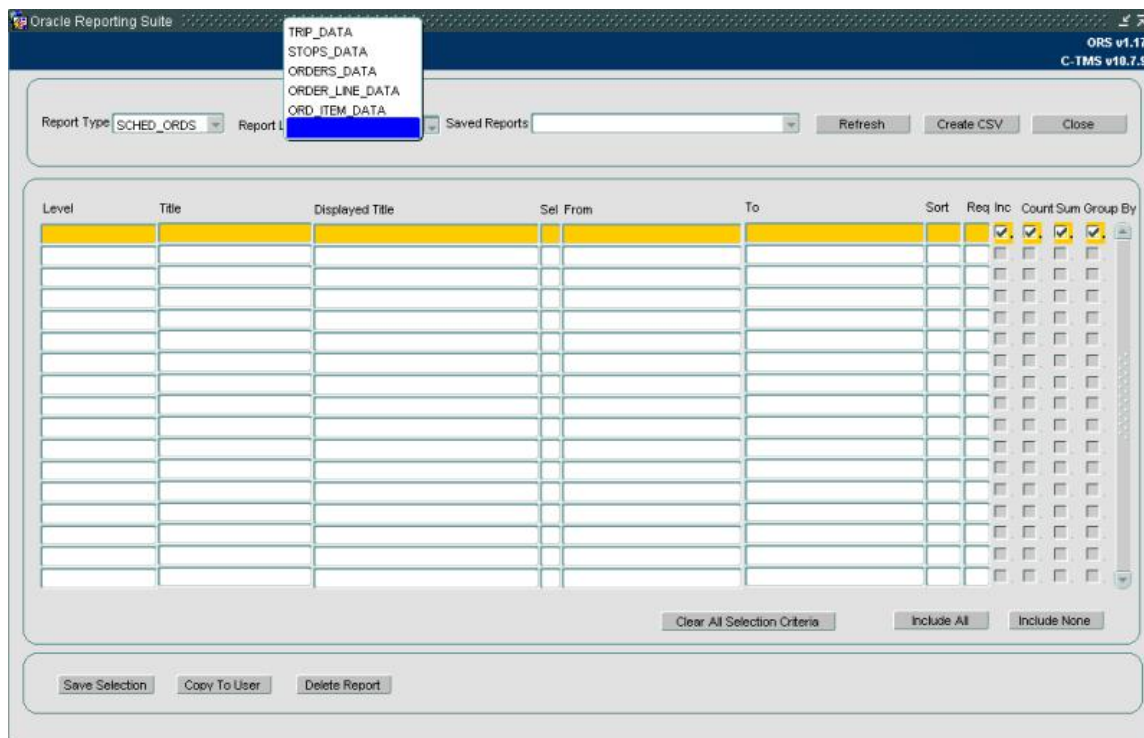
As can be seen above, the report "orderheader1" is no longer shown in the "Saved Reports" list. If after deletion, there was a requirement to retrieve this report we could log on as the user we copied the original report to in section 2.7.

3.14 Count, Sum and Group By

ORS reports allow aggregate functions Count, Sum and Group By.

Note: A system Parameter ORS_SUMMARY controls the display of the Oracle Report suite screen.

When this parameter is set to Y, users are able to group, sum and count information within the report extracts. When this parameter is set to N, the grouping and summary fields will not be available on the screen.



You may only count or sum columns from the lowest level selected. For all other levels, the count and sum will be disabled.

If you choose to select a sum or count, all other columns selected which are not a summary must be selected as a group by. In addition to the group by, the sort order is also required.



Oracle Reporting Suite

Report Type: SCHED_ORDS Report Level: TRIP_DATA Saved Reports: Refresh Create CSV Close

| Level | Title | Displayed Title | Set From | To | Sort | Req | Inc | Count | Sum | Group By |
|-----------|--------------------|--------------------|----------|----|------|-----|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|
| TRIP_DATA | Trip ID | Trip ID | R | | | N | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Schedule | Schedule | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Trip Status | Trip Status | Y | | 1 | N | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| TRIP_DATA | Transport Mode | Transport Mode | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Owning Depot | Owning Depot | Y | | 2 | N | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| TRIP_DATA | Cost Centre | Cost Centre | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Route Code | Route Code | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Carrier Id | Carrier Id | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Driver ID | Driver ID | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Start Time | Start Time | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | End Time | End Time | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Tractor Id | Tractor Id | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Total Distance | Total Distance | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Total Driver Hours | Total Driver Hours | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Trip Cost | Trip Cost | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Utilisation | Utilisation | Y | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TRIP_DATA | Created date | Created date | R | | | N | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Clear All Selection Criteria Include All Include None

In the above example, a new report has been created based on the highest report level within SCHED_ORDS, TRIP_DATA. We are able to select from all the columns available within the TRIP_DATA section.

We have chosen to generate a report which counts the number of trips at each status for each owning depot. To generate this correctly, we have identified the trip id as a count field and defined the sort level for Status and owning depot, with the "group by" ticked.

This will produce an extract similar to the following:

```
COUNT(ST.TRIP_ID), Trip Status, Owning Depot
1, ACCEPTED, DEPOT1
3, ACCEPTED, DEPOT2
8, COMPLETED, DEPOT2
1, DELETED, DEPOT1
3, DELETED, DEPOT2
2, DELETED, DEPOT3
1, EN-ROUTE, DEPOT1
1, EN-ROUTE, DEPOT2
1, PLANNED, DEPOT1
1, PLANNED, DEPOT2
```

3.15 Scheduling ORS Reports

Details of this can be found here: [EDI - Report/Extract Scheduling](#).

3.16 Further Configuration


The following System Parameters affect this functionality:

| Parameter | Description | Level |
|-----------------------|--|--------|
| ORS_DELIMITER | Oracle reporting suite data field delimiter | SYSTEM |
| ORS_SUMMARY | Allow the summarisation OF ORS reports | SYSTEM |
| ORS_TYPE_DEF_GROUP_BY | List of the ORS types to default group by fields | SYSTEM |
| ORS_TYPE_EXC_GROUP | Exclude ORS types from grouping fields | SYSTEM |



4 ORS Reports List

The following is a list of all available ORS reports.

 **Note:** Not all ORS reports are delivered as standard but can be added to the system.

| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|--------------------|---|---------------|-------------------------|
| 3PL_CARR | 1 | 3PL_CARR | Reports on Carrier and trip assigned to 3rd-party carriers (designated as 3PL) | Transactional | Trip |
| ACCOUNT | 1 | CONTRACTS_OUT | Reports on Accounts and Invoice Requirements set up in the system. | Standing Data | Finance |
| ACC_ACCNT | 1 | ACC_ACCNT | Reports on Account set up in the system | Standing Data | Finance |
| ACC_SRVCS | 1 | ACC_SRVCS | Reports on Account Services set up in the system (services supplied) | Standing Data | Finance |
| ACC_SRVCS | 2 | SLIDING_CHG | Adds Sliding Charges from the services supplied to the report | Standing Data | Finance |
| ASSETS | 1 | DETAIL | Reports on Permanent assets configured in the system. | Standing Data | Asset |
| ASSETS | 2 | HISTORY | Adds the history of events against the assets to the report. | Transactional | Asset |
| AWB | 1 | AIRWAY BILL | Reports on AWBs created through Calidus MCS. | Transactional | Item |
| AWB_CONS | 1 | AWS CONS | Reports on AWBs and Consignments to Shipments | Transactional | Trip |
| CARRIERS | 1 | HEADER | Reports on the Carriers core information set up in the system. | Standing Data | Carrier |
| CARR_ALLOC | 1 | CARRIER ALLOCATION | Reports on Carrier and tendered trip assigned to 3rd-party carriers (designated as 3PL) | Transactional | Trip |
| CARR_CLASS | 1 | CLASSES | Reports on Carrier Rules Commodity Class. | Standing Data | Carrier |
| CARR_COMMS | 1 | COMMODITIES | Reports on Carrier Rules Commodity. | Standing Data | Carrier |
| CARR_DUS | 1 | DUS | Reports on Carrier Du Types | Standing Data | Trip |
| CARR_MANF | 1 | CARR_MANF | Reports the full data from Trip down to Order Lines i.e. manifest data. | Transactional | Trip, Order, Line, Item |
| CARR_PRODS | 1 | PRODUCTS | Reports on Carrier Product Types | Standing Data | Carrier |
| CARR_ROUTE | 1 | ROUTES | Reports on Carrier Routes configured in the system | Standing Data | Carrier |
| CARR_ROUTE | 2 | ROUTE_DETAILS | Adds Carrier Route Services to the report | Standing Data | Carrier |
| CARR_SHIP | 1 | SHIPMENTS | Reports on Carrier Shipment rules | Standing Data | Carrier |
| CONTRACTS | 1 | CONTRACTS | Reports on Contracts configured in the system | Standing Data | Finance |
| CONTRACTS | 2 | TARIFFS | Adds Tariffs to the report | Standing Data | Finance |
| CONTRACTS | 3 | TIERS | Adds Tiers to the report | Standing Data | Finance |
| CONTRACTS | 4 | CHARGES | Adds Charges to the report | Standing Data | Finance |
| CONTRACTS | 5 | CHARGE DETAILS | Adds Charge Details to the report | Standing Data | Finance |
| CONTRACTS | 6 | CONDITITIONS | Adds Charge Conditions to the report | Standing Data | Finance |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|------------------|--|---------------|-------------------|
| CONTRACTS | 7 | VEHICLE | Adds Vehicle to the report | Standing Data | Finance |
| CONT_JRNY | 1 | CONT_JRNY | Reports on Contracts and Tariffs on standard journeys (geographical restrictions) | Standing Data | Finance |
| CUSTOMERS | 1 | CUSTOMERS | Reports on Customers core information configured in the system. | Standing Data | Customer |
| CUST_CHRGS | 1 | CUST_CHRGS | Reports on Customer Charges configured in the system for a customer. | Standing Data | Customer |
| CUST_COST | 1 | CUST_COST | Reports on Customer Cost Plus configured in the system for a customer. | Standing Data | Customer |
| CUST_DATA | 1 | CUST_DATA | Reports on Customer Cut-offs configured in the system for a customer. | Standing Data | Customer |
| CUST_FUEL | 1 | CUST_FUEL | Reports on Customer Fuel Surcharges configured in the system for a customer. | Standing Data | Customer/Finance |
| CUST_FUELC | 1 | CUST_FUELC | Reports on Customer Fuel Surcharges configured in the system for a customer. | Standing Data | Customer/Finance |
| CUST_PAIN | 1 | CUST_PAIN | Reports on Customer Pain/Gain rules configured in the system for a customer. | Standing Data | Customer |
| CUST_PREFS | 1 | CUST_PREFS | Reports on Customer Prefs configured in the system for a customer. | Standing Data | Customer |
| CUST_SCHED | 1 | CUST_SCHED | Reports on Customer Schedule Engine Thresholds configured in the system for a customer. | Standing Data | Customer |
| CUST_SEC | 1 | CUST_SEC | Reports on Customer Secure Transport configured in the system for a customer. | Standing Data | Customer |
| CUST_SEC_C | 1 | CUST_SEC_C | Reports on Customer Security configured in the system for a customer. | Standing Data | Customer |
| DEL_TIMES | 1 | MORNING-DELTIMES | A "Morning Report", showing Delivery Times from trips executed. | Transactional | Trip, Item |
| DEL_TRIPS | 1 | DEL_TRIPS_ORD | Reports on Trips and Trip Stops and Orders. | Transactional | Trip, Stop, Order |
| DEL_TRIPS | 2 | DEL_LINE_DATA | Adds Order Lines to the report. | Transactional | Line |
| DEL_TRIPS | 3 | DEL_ITEM_DATA | Adds Order Items to the report. | Transactional | Item |
| DOOD_RPT | 1 | STANDARD | Day out of Days report for Lane orders. | Transactional | Trip |
| DRIVERS | 1 | HEADER | Reports on Drivers/Crew configured in the system. | Standing Data | Resource |
| DU_TYPES | 1 | DU_TYPES | Reports on DU types configured in the system | Standing Data | Resource |
| EX_CARRIER | 1 | HEADER | Reports on the Carriers core information set up in the system. | Standing Data | Carrier |
| EX_HAUL | 1 | HEADER | Reports on the Haulage Activity for executed trips (Load/Unload) | Transactional | Trip, Stop |
| EX_LOC | 1 | HEADER | Reports on the Locations set up in the system, and the usage (which Customer/Group they "belong" to) | Standing Data | Geographical |
| EX_ORDHEAD | 1 | HEADER | Reports on Orders, Locations and Contacts. | Transactional | Order |
| EX_ORDHEAD | 2 | ORD_ITEM_DATA | Adds Items to the report | Transactional | Item |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|--------------------|---|---------------|---------------|
| EX_ORDITEM | 1 | HEADER | Reports on Order Items on orders | Transactional | Item |
| EX_ORDLINE | 1 | HEADER | Reports on Order Lines on orders | Transactional | Line |
| EX_PERSON | 1 | HEADER | Reports on Drivers/Crew configured in the system. | Standing Data | Resource |
| EX_TRACTOR | 1 | HEADER | Reports on Tractors or Vehicles configured in the system. | Standing Data | Resource |
| EX_TRAILER | 1 | HEADER | Reports on Trailers or Vehicles configured in the system. | Standing Data | Resource |
| EX_TRIP | 1 | HEADER | Reports on Trip Header information. | Transactional | Trip |
| EX_TRPSTOP | 1 | HEADER | Reports on Trips and Stops information. | Transactional | Trip, Stop |
| FAILED | 1 | MORNING-FAILED | A "Morning Report", showing Failed items i.e. items not delivered. | Transactional | Trip, Item |
| FIX_ROUTE | 1 | ROUTES | Reports on Fixed Routes configured in the system. | Standing Data | Planning |
| FIX_ROUTE | 2 | ROUTE_STOPS | Reports on Fixed Routes and Stops configured in the system. | Standing Data | Planning |
| HAULIER | 1 | SCH_TRIP | Reports on Trips and Stops information. | Transactional | Trip, Stop |
| HELD | 1 | MORNING-HELD | A "Morning Report", showing failed items that are to be held at the outbase for redelivery. | Transactional | Trip, Item |
| IMP_DECODE | 1 | IMP_DECODE | Reports on any configured import/export decode tables and data set up in the system. | Standing Data | Import |
| INTERFACE | 1 | INTERFACE | Reports on interface triggered events. | Transactional | EDI |
| INT_XML | 2 | DETAIL | Adds detail information to the report. | Transactional | EDI |
| INV_TYPE | 1 | INVOICES_DATA | Reports on Invoices generated for accounts. | Transactional | Finance |
| INV_TYPE | 2 | PAYMENTS_DATA | Adds Payment data included on an invoice to the report. | Transactional | Finance |
| LABOUR | 1 | SCH_ORD_LABOUR | Reports on Labour for orders. | Transactional | Order |
| LOCKED_OUT | 1 | LOCKED_OUT | Reports on Payments generated against Orders where the status is F or A | Transactional | Finance |
| MCS_DTLS | 1 | MCS_DETAILS | Reports on Items scanned or to be scanned through Calidus MCS | Transactional | MCS |
| NAVTEQ | 1 | HEADER | Reports on Geocoding and Route Time/Distance calculations called from external systems. | Standing Data | Geographical |
| NETWORK | 1 | LOCATIONS | Reports on Network Locations in the system, for time and distance calculations | Standing Data | Geographical |
| NETWORK | 2 | DRIVE_TIME_DETAILS | Adds drive time details from that location to other locations to the report. | Standing Data | Geographical |
| NON_CONF | 1 | HEADER | Reports on Order Non-conformance Information . | Transactional | Order |
| NON_CONF | 2 | LINE | Adds Lines to the report | Transactional | Line |
| NON_CONF | 3 | ITEMS | Adds Items to the report | Transactional | Item |
| NON_CONF | 4 | NON_CONFORM | Adds non-conformance/reasons information to the report | Transactional | Item History |
| O/S SCANS | 1 | MISSING_SCANS | Reports on items not scanned through Calidus MCS. | Transactional | MCS |
| OPEN_AWB | 1 | V_MCS_OPEN_AWB | Reports on Open AWBs through Calidus MCS | Transactional | MCS |
| ORDERS | 1 | HEADER | Reports on Order Header Information | Transactional | Order |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|-------------------|--|---------------|---------------|
| ORDERS | 2 | LINE | Adds Lines to the report | Transactional | Line |
| ORDERS | 3 | ITEMS | Adds Items to the report | Transactional | Item |
| ORDER_ITEM | 1 | ORD_ITEM_DATA | Reports on Order Items on orders (including order information relating to the From and To locations) | Transactional | Item |
| ORDLN_TYPE | 1 | ORDER_LINE_DATA | Reports on Order Lines, including Location and Customer information. | Transactional | Line |
| ORD_IN_INV | 1 | ORD_IN_INV_DATA | Bespoke order invoice report | Transactional | Finance |
| ORD_OFFSET | 1 | ORDER_OFFSETS | Reports on Location time offsets configured in the system. | Standing Data | Geographical |
| ORD_STATS | 1 | SCH_ORDER_STATS | Reports on Order Stats - summary report of orders created, delivered or for delivery. | Transactional | Order |
| ORD_TYPE | 1 | ORDERS_DATA | Reports on Orders (including order information relating to the From and To locations) | Transactional | Order |
| OWN_CHRGs | 1 | OWN_CHARGES | Reports on Own Package Charges | Standing Data | Finance |
| PALLETS | 1 | PALLETS | Reports on Shipment Pallets created in Calidus MCS | Transactional | MCS |
| PALLETS | 2 | PALLET_ITEM | Adds Items to the report | Transactional | MCS |
| PALL_ITEM | 1 | PALLET_ITEM | Reports on Shipment Pallet Items created in Calidus MCS | Transactional | MCS |
| PAYMENTS | 1 | PAYMENTS_DATA | Reports on generated payments of all types | Transactional | Finance |
| PAYMENTS | 2 | EVENT_DETAILS | Adds event details to the report | Transactional | Finance |
| RE-DELIVER | 1 | SCH_ORD_RE_DEL | Reports on history of rebooked orders. | Transactional | Order |
| REASONS | 1 | ORD_ITEM_DATA | Reports on Order Item non-confirmances | Transactional | Item History |
| REASONS | 2 | ORD_ITEM_REASON | Adds Reason Code Information to the report | Transactional | Item History |
| RES_EQUIP | 1 | SCH_ORD_RES_EQUIP | Reports on Order Equipment Requirements. | Transactional | Order |
| RPE_CUST | 1 | RPE_CUST | Bespoke customer RPE data. | Standing Data | Resource |
| RTE_COSTS | 1 | RTE_COSTS | Reports on fixed costs against routes | Standing Data | Planning |
| RULES | 1 | RULES | Reports on Schedule Rules configured in the system. | Standing Data | Planning |
| SCANS | 1 | TRIP | Reports on Trips | Transactional | Trip |
| SCANS | 2 | STOP | Adds Stop information to the report. | Transactional | Stop |
| SCANS | 3 | ORDER | Adds Order and Item information to the report. | Transactional | Order, Items |
| SCANS | 4 | ASSET | Adds Permanent Asset information to the report. | Transactional | Asset |
| SCANS | 5 | REASON | Adds non-conformance/reasons information to the report | Transactional | Reasons |
| SCHED_ORD2 | 1 | TRIP_DATA | Reports on Trip, Stop and Location information. | Transactional | Trip |
| SCHED_ORD2 | 2 | STOPS_DATA | Adds Haulage Activity to the report | Transactional | Stop |
| SCHED_ORD2 | 3 | ORDERS_DATA | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| SCHED_ORD2 | 4 | ORDER_LINE_DATA | Adds order line information to the report. | Transactional | Line |
| SCHED_ORD2 | 5 | ORD_ITEM_DATA | Adds order item information to the report. | Transactional | Item |
| SCHED_ORDS | 1 | TRIP_DATA | | Transactional | Trip |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|-----------------|--|---------------|------------------|
| | | | Reports on Trip, Stop and Location information. | | |
| SCHED_ORDS | 2 | STOPS_DATA | Adds Haulage Activity to the report | Transactional | Stop |
| SCHED_ORDS | 3 | ORDERS_DATA | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| SCHED_ORDS | 4 | ORDER_LINE_DATA | Adds order line information to the report. | Transactional | Line |
| SCHED_ORDS | 5 | ORD_ITEM_DATA | Adds order item information to the report. | Transactional | Item |
| SRVCS_CAPT | 1 | SRVCS_CAPT | Reports on Account Service Rates set up in the system. | Standing Data | Finance |
| STD_ORDS | 1 | ORDER_AND_TRIP | Reports on Order Header Information | Transactional | Order |
| STD_ORDS | 2 | LINE | Adds Lines to the report. | Transactional | Line |
| STD_ORDS | 3 | ITEM | Adds Items to the report. | Transactional | Item |
| STD_ORDS | 4 | FINANCE | Adds Finance information to the report. | Transactional | Finance |
| STD_TIMES | 1 | ORDER_AND_TIMES | Reports on order, vehicle and times. | Transactional | Order |
| STD_TRIPS | 1 | TRIP | Reports on Trip, Stop and Location information. | Transactional | Trip |
| STD_TRIPS | 2 | STOPS | Adds Haulage Activity to the report | Transactional | Stop |
| STD_TRIPS | 3 | ORDERS | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| STD_TRIPS | 4 | ORDER_LINE | Adds order line information to the report. | Transactional | Line |
| STOPS | 1 | STOP_DATA | Reports on Trip, Stop, Location and Haulage Activity. | Transactional | Trip, Stop |
| STORAGE | 1 | SCH_ORD_STORE | Bespoke white glove report. | Transactional | Order |
| SUCCESS | 1 | MORNING-SUCCESS | A "Morning Report" showing successful collections/Deliveries. | Transactional | Order |
| TRACTORS | 1 | HEADER | Reports on Tractors or Vehicles configured in the system. | Standing Data | Resource |
| TRAILERS | 1 | HEADER | Reports on Trailers or Vehicles configured in the system. | Standing Data | Resource |
| TRIP | 1 | HEADER | Reports on Trips | Transactional | Trip |
| TRIP_SCANS | 1 | TRIP_SCANS | Reports on Items on Trips | Transactional | Trip Scans |
| TRIPS | 1 | TRIP | Reports on Trip, Stop and Location information. | Transactional | Trip |
| TRIPS | 2 | STOPS | Adds Stop information to the report | Transactional | Stop |
| TRIPS | 3 | ORDERS | Adds Order, Contact and Customer information to the report. | Transactional | Order |
| TRIPS | 4 | ORDER_LINE | Adds order line information to the report. | Transactional | Line |
| TRIP_LOCS | 1 | TRIP_DATA | Reports on Trip Stop and Locations, for Loading and Unloading activity | Transactional | Trip |
| TRIP_TYPE | 1 | TRIP_DATA | Reports on trip data | Transactional | Trip |
| TRIP_TYPE | 1 | TRIP_TYPE | Summary of 3PL assigned trips | Transactional | Trip |
| TRL_TYPES | 1 | HEADER | Reports on Trailer Types | Standing Data | Resource |
| TYREKEYCUS | 1 | PERIOD | Fleet Maintenance report | Transactional | Fleet Management |
| TYREKEYGRP | 1 | PERIOD | Fleet Maintenance report | Transactional | Fleet Management |
| TYRE_INSP | 1 | ORDER_AND_TRIP | Fleet Maintenance report | Transactional | Trip, Order |
| TYRE_INSP | 2 | VEHICLE_TYRES | Fleet Maintenance report | Transactional | Vehicle |
| TYRE_INSP | 3 | INSPECTIONS | Fleet Maintenance report | Transactional | Inspections |
| TYRE_ORDS | 1 | ORDER_AND_TRIP | Fleet Maintenance report | Transactional | Trip, Order |
| TYRE_ORDS | 2 | LINE | Fleet Maintenance report | Transactional | Line |
| TYRE_ORDS | 3 | ITEM | Fleet Maintenance report | Transactional | Item |



| Type | Level | Name | Description | S/T | Data Reported |
|------------|-------|---------|---------------------------------------|---------------|---------------|
| TYRE_ORDS | 4 | FINANCE | Fleet Maintenance report | Transactional | Finance |
| VOLUMETRIC | 1 | DATA | Product vehicle volumetric data | Standing Data | Product |
| ZONE | 1 | ZONE | Reports on Zones set up in the system | Standing Data | Geographical |



5 Reports

C-TMS Reports provides the users with reports that are required for day to day operations, finance and management reporting.

C-TMS Reports can be accessed from the C-TMS Modules menu.

5.1 Report Selection

Once you click on the Reports option, the form as shown below will be displayed.

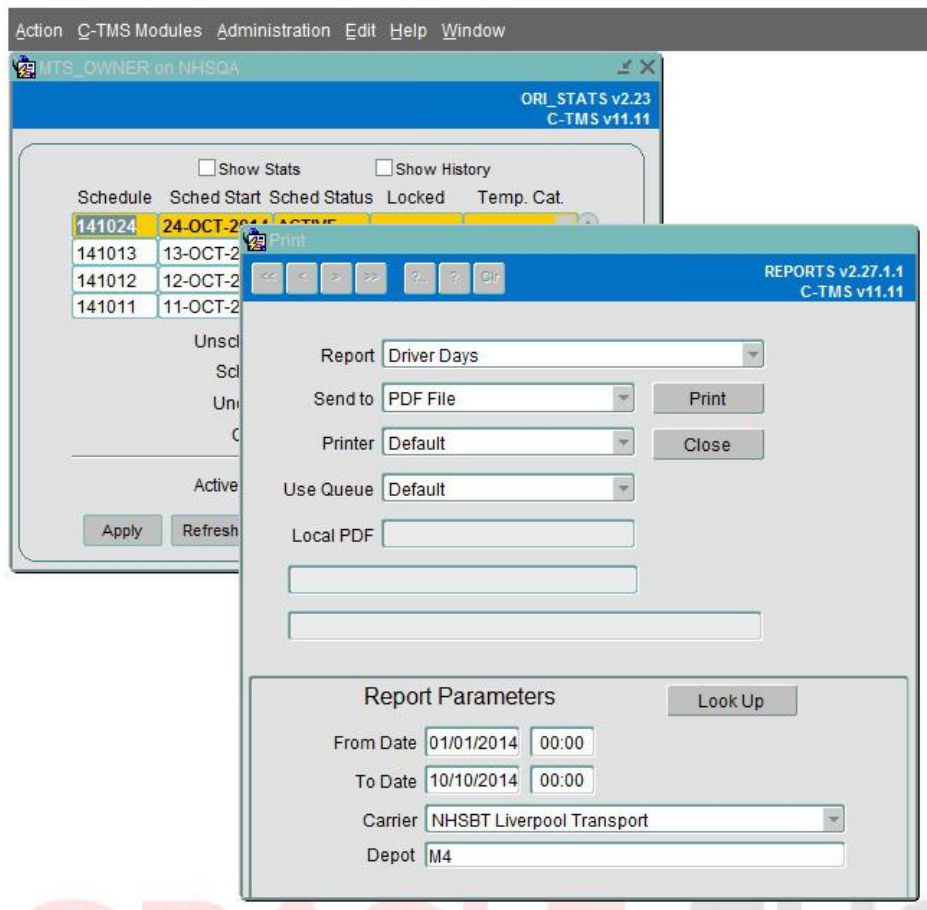
Select the required report from the Report drop down field. Based on the report that you are selecting a list of parameters for generating the report will be displayed as shown below.

5.2 Parameter Selection

In this example, we will look at generating the Driver Run Sheet Report. Once the Driver Run Sheet option is selected, the list of parameters for generating the driver sheet will be prompted as shown below. Based on the report that you are



selecting the report parameters will vary.



Enter the From Date, To Date, Carrier and the Depot details as specific selection criteria to narrow down the data selection for the reported information.

Where the selection is from a validated list of master data either a dropdown is available or the **Look Up** button can be used.

Note: If wide ranging parameter selections are chosen then this could take some time to generate the output, firstly to select all the necessary records and secondly to transfer the report file to your web browser.

5.3 Report Output

To generate the report click the **Print** button and this will open a detached new browser window with a specific report URL which will display the report output.



Date: 10/10/14

Time: 09:39

Page: 1 of 40

Driver Days

From Date 01/01/14 00:00

To Date 10/10/14 00:00

Trip ID

Status

Depot Liverpool Blood Centre

Carrier LIV_TRSPT

TRIP_ITINERARY v2.6

C-TMS v11.11

| | | | | | | | | | | | |
|---|---|------|----------------------|--------------|--------------|--------------|---------|------------|-----|--|--|
| 16/09/14 07:45 | | | | | | | | | | | |
| RTE-00000518 | | Stop | Location | Arrive (Act) | Depart (Act) | Trailer Type | Trailer | RPE Weight | Vol | | |
| <div>Trip 140916 RTE-00000518</div> <div>BOL</div> <div>Status PLANNED</div> <div>Driver</div> <div>Carrier LIV_TRSPT</div> <div>Cost</div> | 1 | SU | Liverpool Blood Cent | 07:45 | 08:15 | BI | | | | | |
| | 2 | DL | Halton General | 08:30 | 09:00 | BI | | | | | |
| | 3 | DL | Whiston | 09:05 | 09:35 | BI | | | | | |
| | 4 | DL | Broadgreen | 09:35 | 10:05 | BI | | | | | |
| | 5 | DL | Alder Hey/Royal Live | 09:55 | 10:25 | BI | | | | | |
| | 6 | DL | Fazakerley / Uni Mos | 10:30 | 11:00 | BI | | | | | |
| | 7 | DL | Southport Hospital | 11:30 | 12:00 | BI | | | | | |
| | 8 | DL | Ormskirk & District | 12:40 | 13:10 | BI | | | | | |
| | 9 | CL | Warrington District | 14:15 | 14:45 | BI | | | | | |
| 16/09/14 07:45 | | | | | | | | | | | |
| RTE-00000369 | | Stop | Location | Arrive (Act) | Depart (Act) | Trailer Type | Trailer | RPE Weight | Vol | | |
| <div>Trip 140916 RTE-00000369</div> <div>BOL</div> <div>Status PLANNED</div> <div>Driver</div> <div>Carrier LIV_TRSPT</div> <div>Cost</div> | 1 | SU | Liverpool Blood Cent | 07:45 | 08:15 | BI | | | | | |
| | 2 | DL | Halton General | 08:30 | 09:00 | BI | | | | | |
| | 3 | DL | Whiston | 09:05 | 09:35 | BI | | | | | |
| | 4 | DL | Broadgreen | 09:35 | 10:05 | BI | | | | | |
| | 5 | DL | Alder Hey/Royal Live | 09:55 | 10:25 | BI | | | | | |
| | 6 | DL | Fazakerley / Uni Mos | 10:30 | 11:00 | BI | | | | | |
| | 7 | DL | Southport Hospital | 11:30 | 12:00 | BI | | | | | |
| | 8 | DL | Ormskirk & District | 12:40 | 13:10 | BI | | | | | |
| | 9 | CL | Warrington District | 14:15 | 14:45 | BI | | | | | |
| 16/09/14 07:45 | | | | | | | | | | | |
| RTE-00000667 | | Stop | Location | Arrive (Act) | Depart (Act) | Trailer Type | Trailer | RPE Weight | Vol | | |
| <div>Trip 140916 RTE-00000667</div> <div>BOL</div> <div>Status PLANNED</div> <div>Driver</div> <div>Carrier LIV_TRSPT</div> <div>Cost</div> | 1 | SU | Liverpool Blood Cent | 07:45 | 08:15 | BI | | | | | |
| | 2 | DL | Halton General | 08:30 | 09:00 | BI | | | | | |
| | 3 | DL | Whiston | 09:05 | 09:35 | BI | | | | | |
| | 4 | DL | Broadgreen | 09:35 | 10:05 | BI | | | | | |
| | 5 | DL | Alder Hey/Royal Live | 09:55 | 10:25 | BI | | | | | |
| | 6 | DL | Fazakerley / Uni Mos | 10:30 | 11:00 | BI | | | | | |
| | 7 | DL | Southport Hospital | 11:30 | 12:00 | BI | | | | | |
| | 8 | DL | Ormskirk & District | 12:40 | 13:10 | BI | | | | | |
| | 9 | CL | Warrington District | 14:15 | 14:45 | BI | | | | | |

Note: All C-TMS Reports produced by Oracle Reports are in PDF (this is different functionality than the C-TMS Export which is in CSV format).

5.3.1 Send to

Reports can be created and accessed in a number of ways by send to: printer; preview; pdf file; file; and browser.

- 'Printer' option prints the report directly to a default or specified printer.
- 'Preview' option displays the report in a previewer window, from where it can be viewed and printed.
- 'PDF' option creates the report as a pdf file on the user's machine, where it can be viewed in the adobe acrobat reader application.
- 'File' option creates a print file.
- 'Browser' option produces a view of the report when accessing C-TMS via a web-browser.

5.3.1.1 Printer


This allows the choice of a particular printer connected either on the C-TMS network, or, a default printer. The default printer is usually the default printer set up on the user's machine.

5.3.1.2 Local PDF

This is used to define a path where the pdf file is to be created on the user's machine.

5.4 Available Reports

A variety of reports are available in the C-TMS system, and bespoke reports are developed when required by the business.

 **Note:** User access to particular reports is controlled by the Administration section of C-TMS and is maintained by administrator users of the system. See the [Administration](#) section for further information.

The main reports available in the system at present are described below:



| Report | Description |
|--------------------------------|--|
| Abnormal Product Volumes | The information for this report is collated from the Product Item file form, provided by uploaded product data from clients' third-party systems. Parameters to be supplied are: Minimum volume and maximum volume, both in cubic metres, and the number of days for the report to cover, working back from the present day. This report is typically used if a problem with the DU's arises, i.e. case sizes. |
| Abnormal Product Weights | The information for this is collated from the Product Item file, provided by uploaded product data from clients' third-party systems. Parameters to be supplied are: Minimum and maximum weight, both in kilograms, and the number of days for the report to cover, working back from the present day. This report is typically used if a problem with the DU's arises, i.e. case sizes. |
| Adjusted Invoice | This report is called from the Invoices form. It produces an Adjusted Invoice for those customers using Provisional Invoicing Advance Orders This report is used by the planner to check what advances are in the system. Data can be displayed for all or a given schedule. |
| Backhaul Schedule | This provides a view of all collections and back-hauls, and is used to check what is planned against the supplier's requirements. The data is displayed for a user-supplied depot. |
| Breach Driving Regulations | This prints the total driving time and the total trip time for all carriers/trips that have breached |
| Collections Deviation Distance | This report display trip details for depot and collection location. |
| Collections Excess Distance | This report prints trip details for those trips which have exceeded the specified distance for depot specified. |
| Customer Invoice | This report is called from the Invoices form, and produces invoices for the specified customer |
| Daily KPI by Schedule | This report displays various KPI information, such as no of Orders on a schedule , No of trips on a schedule, No of on-time deliveries on a schedule, etc |
| Driver Days | This report enables transport departments to monitor trips and changes to trips for a given time period. It provides information about the current status of trips, the drivers assigned to the trip and the volumes being transported. The parameters required are date range, depot and carrier. |
| Driver Itineraries | This report is used by the sites. It outlines the trips leaving from a site, the times, their destinations and the load in RPEs for each trip. The required parameters are date range and depot. |
| Early/Late Deliveries (MTM) | This shows all the early and late deliveries and shows order id, trip numbers, destination of orders, the type of produce, quantity and unloads start time. The parameters that can restrict the results for this report are as follows: Product type, Before/After time, Schedule, Depot,Arrive Time. |
| Excess Waiting Time | This report display trips which have a waiting time greater than that specified for a specified carrier |



| Report | Description |
|-------------------------------|---|
| Grid Closure | This report shows what products have been picked out side of Grid Closure (POR) The parameters used to restrict the results for this report are as follows: Schedule, Depot, Product type, Grid Closure Time. |
| Haulier Confirmation | This report displays carrier information along with trip details |
| Haulier Performance | This report display the performance of each haulier for a specific period of time |
| Inbound Schedule | This report shows all the trips scheduled to arrive at depots. The parameters used to restrict the results for this report are: From and to dates, Trip Status, Depot |
| KPI by Lane | This report displays various KPI's for a specified period of time |
| KPI Summary | The report allows planners to analyse the quality of the plan against the KPI's to be achieved. The results are restricted by choice of schedule. |
| Loading Schedule | This report is typically used by a planning centre, and sites and is used quite frequently (2-3 times daily). It displays the state of the plan, and any updated changes made to trips on the plan. The parameters used to restrict the results for this report are as follows: Date range, Carrier, Inclusion of order number(yes/no), Depot, Date the information has changed since. |
| Location Delivery Pre-Warning | This report has been renamed to Location Pre-Warning |
| Location Pre-Warning | This report shows the Collection and/or Delivery activities for a given Depot. The parameters used to restrict the results for this report are as follows: Date Range, Trip Status: ALL or Accepted, Load Type: Collected, Delivered or Both, Depot: the list of locations available to the user is determined by whether the operation is using the Lane Based Order mechanism and whether the user is assigned the LBO_TRACKING user parameter. In this case, the list of locations will be based on which lanes the user is authorised to see. If the Lane Based mechanism is not being used by the operation, then the list of depots will be a combination of the Based-at user parameter and the locations set up by the Customer/Customer Group mechanism. |
| Multi Drops Excess Distance | This shows the trips in C-TMS for a chosen depot where the distance between 2 deliveries at Customer/Store locations is greater than a specified parameter. The results are restricted further by a date range. |
| Multiple Deliveries | This shows locations and order details where multiple deliveries are to be made for a particular date range. The parameters used to restrict the results for this report are as follows: Date range, Maximum time. |
| Non-Slot Deliveries | This shows all the deliveries to be delivered outside of a locations slot. The parameters used to restrict the results for this report are as follows: Schedule, Depot. |
| Order Variance Qty by Product | This report shows all the orders that have a variance against them, where the Create TI's process from Bookings Information has created the orders. The parameters used to restrict the results for this report are as follows: Schedule, Source location, Destination Location, Product Type , Minimum DU variance. |
| Order Variance Qty | This report shows the same as Order Variance Qty by Product but groups the result by store. |



| Report | Description |
|-----------------------------|---|
| by Store | |
| Order Variance Qty by Trip | This report shows the same as Order Variance Qty by Product but shows the result by trip. |
| Pending Supplier Invoices | This report displays the pending supplier invoices, with total amount of all invoices, for a user-supplied date range |
| Plan Exceptions | <p>This report displays several sections of planning exceptions:</p> <ul style="list-style-type: none"> • Non Slot Deliveries • Advance Breaches • Short Trips • Missing Trailer Types • Light Trips • Over Laden Trips • Missed Collection Windows • Incompatible Temperature Combinations |
| Excessive Deviation Mileage | The report allows the planners to analyse and decide if changes to the schedule are required.. The parameters used to restrict the results for this report are as follows: Schedule, Maximum deviation miles, Light trip minimum RPEs, Over laden Trip Tol., Short trip minimum number of miles |
| Slot Usage | <p>The report displays which slots that have been used in the creation of Transport Instructions, and the RPEs being transported for that particular slot for a particular period of time. The parameters used to restrict the results for this report are as follows:</p> <p>Date range, Slot Usage(all or advances), Depot</p> |
| Slot Variance | The report displays all new slots that have been created in C-TMS since the last VAST file upload, or created manually in the system. The parameter used to restrict the results is Slot variance with a choice of ?manual? or ?new?. |
| Store Cage Collections | The report displays all the trips for stores and the associated RPE quantity of cages returned to an RDC with the query restricted by the number of stops on a trip that return to RDCs as a percentage of the overall trip. The parameters used to restrict the results for this report are as follows: Date range, RDC Return less percentage. |
| The Driver Sheet | The report displays the trip deliveries for a particular day for a chosen driver. This outlines the driver's day. The parameters used to restrict the results for this report are as follows: Date range, Depot, Trip Id. |
| The Front Desk Sheet | <p>This report shows all the departures from a particular depot and includes information such as destination of orders, driver, trailer type and total distance. The parameters used to restrict the results for this report are as follows: Date range,</p> <p>Depot.</p> |
| Trailer Shunting | This report is typically used by sites to track the shunting of the trailers. The parameters used to restrict the results for this report are as follows: Date range, Depot. |
| Trip Summary | This report provides summary information about trips for a specified time period such as start and departure times, total mileage of each trip, first |



| Report | Description |
|--------------------|--|
| | collection and first delivery locations, carrier, and early and late delivery times. |
| Unplanned Quantity | <p>This report shows the underplanned and overplanned quantities of types goods, e.g. Perishable, Frozen etc. for each depot for a particular Schedule. The parameters used to restrict the results for this report are as follows: Schedule date, Show Store Detail,</p> <p>Depot, Underplanned RPEs, Overplanned RPEs.</p> |

A full list of all reports is in section [Reports List](#).

