# Initial Setup

# Contents

# 1 Initial Setup

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# 2 Set Up C-TMS

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

## 2.1 Initial Setup

Start using the OBS Administrative user

## 2.2 Basic Setup

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

## 2.3 Geographical

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

### 2.3.1 Regions and Region Depots

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

This logic depends on the creation of the following data:

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

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

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

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

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

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

## 2.4 Admin User for the Customer

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

## 2.5 Resources

Set up the following:

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

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

## 2.6 Accounts

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

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

## 2.7 Bespoke Setup

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

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♦ TomTom WEBFLEET
♦ FlexiPOD
- C-PORTAL TTM

## 2.7.1 Fixed Routes

Parameters:

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

### 2.7.1.1 Domestic/Home Delivery

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

Parameters:

- TRM_LOC_RADIAL_ROUTES - "N"

Schedule Rules:

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

Zones:

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

Locations:

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

Routes:

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

Monitoring:

- Use the Schedule Rules Audit tab and refresh.

## 2.7.2 C-ePOD Settings

EPOD settings on:

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

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

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

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

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

## 2.7.3 C-PORTAL TTM Settings

Predominantly against the customer.

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