



Aptean

# Maintenance - Static Data Guide

Calidus TMS - 12.45

14th October 2014 - 2.0  
Reference: Maintenance

# Contents

1 Static Data.....	1
1.1 Tabs.....	1

# 1 Static Data

The Static Data module encompasses the maintenance of static data used by the system.

The data can be viewed, created, edited and maintained through the accompanying Static Data Maintenance Maintenance form.

You can access the screen through the Maintenance menu.

## 1.1 Tabs

### 1.1.1 Region Data

This tab allows for the maintenance of region data:

Country Code	Postal Region	Planning Region	Alt Country Code
GB	A	SCO	
GB	AB	SCO	
GB	AL	LBZ	
GB	B	BRM	
GB	BA	BRI	
GB	BB	PRE	
GB	BD	PRE	
GB	BH	POM	
GB	BL	PRE	
GB	BN	KEN	
GB	BR	KEN	
GB	BS	BRI	

You can maintain the grouping of postal regions to planning regions.

Entries in this table control the setting of the 'Planning Region' against new locations. As new locations are created the Postal Region is set based on the Postcode stored against the address data.

The Postal Region can be dynamic based on the postcode format of the country - for the UK it takes the first 'character' based portion of the postcode e.g. L or BR.

The Postal Region from the location is then used to reference the matrix as entered in the Region Data tab and ascertain the correct Planning Region to store against the Location. It allows the grouping of one or more Postal Regions into a single Planning Region. An individual Postal Region cannot exist in more than one Planning Region.

The Planning Region can then be used in the planning process to filter the Order Well based on collection and delivery locations.

There are five buttons at the bottom of the screen:

- **New** - Allows you create a new region.
- **Delete** - Delete an existing region.
- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.
- **Radial Routing** - Edit Radial Routing. Here you can add the type of radial routing (Collection, Delivery, Both or None), and the location types that are affected by this rule. This is optional.



You can also import Region data through **Imports**:

- **REGION\_DATA**

### 1.1.2 Region Depot

This tab allows for the maintenance of region depot data:

Planning Region	Depot	Group Name	Origin Port	Cost Centre	Priority
BAM	BAM			POLAR-CC	
BRM	BRM			POLAR-CC	
COA	COA			POLAR-CC	
EXE	EXE			POLAR-CC	
LBZ	LBZ			POLAR-CC	
LEE	LEE			POLAR-CC	
NEW	NEW			POLAR-CC	
POM	POM			POLAR-CC	
PRE	PRE			POLAR-CC	
SCO	SCO			POLAR-CC	
SWA	SWA			POLAR-CC	
ANG	ANG			POLAR-CC	

You can define the depots that are responsible for each planning region.

Entries in this table control two C-TMS functions:

- Scheduling Engine - identifying applicable Fixed Routes
- Order creation - setting the group name

**Planning Region to Depot matrix** - defines which planning region areas (and ultimately groups of location addresses) are under the control/responsibility of a particular depot. One or more Planning Regions can be added under the control of a particular depot. This is largely for the identification of applicable Fixed Routes in automatic planning.

**Planning Region to Group Name matrix** defines which Group Name should be stamped against an order during any none manual order creation (e.g. Specific EDI flows, Portal etc). The order locations are used to identify the Planning Region of the Collection/Delivery location and the appropriate Group Name is identified. This ultimately controls the order visibility in the Planning Well depending on the user parameter configuration.

There are four buttons at the bottom of the screen:


- **New** - Allows you create a new region depot.
- **Delete** - Delete an existing region depot.
- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.

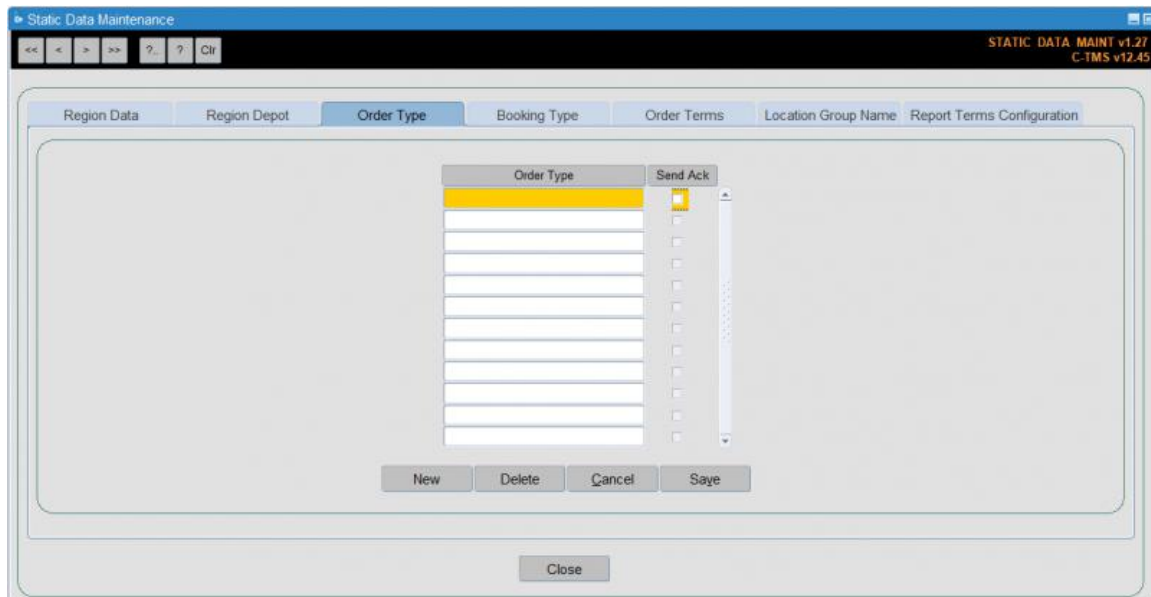
You can also import Region Depot assignment data through **Imports**:

- **REGION\_DEPOT**



### 1.1.3 Order Type

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




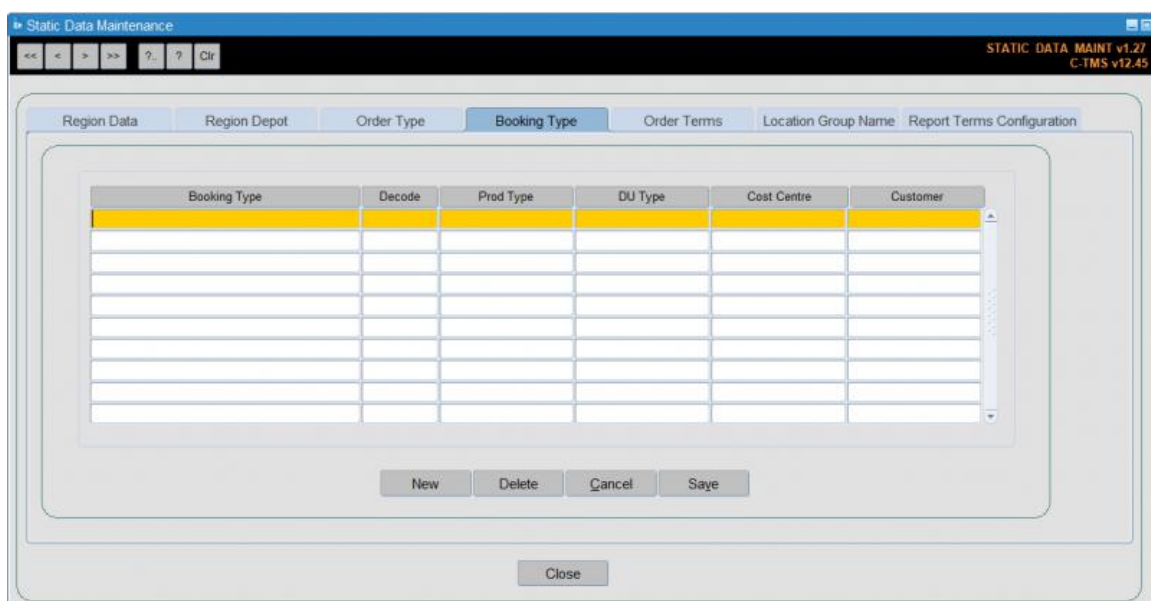
The screenshot shows the 'Static Data Maintenance' window with the 'Order Type' tab selected. The window has a title bar with 'Static Data Maintenance' and a status bar with 'STATIC DATA MAINT v1.27' and 'C-TMS v12.45'. The main area contains a table with columns 'Order Type' and 'Send Ack'. Below the table are buttons for 'New', 'Delete', 'Cancel', and 'Save'. At the bottom of the window is a 'Close' button.

There are four buttons at the bottom of the screen:

- **New** - Allows you create a new order type.
- **Delete** - Delete an existing order type.
- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.

### 1.1.4 Booking Type

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



The screenshot shows the 'Static Data Maintenance' window with the 'Booking Type' tab selected. The window has a title bar with 'Static Data Maintenance' and a status bar with 'STATIC DATA MAINT v1.27' and 'C-TMS v12.45'. The main area contains a table with columns 'Booking Type', 'Decode', 'Prod Type', 'DU Type', 'Cost Centre', and 'Customer'. Below the table are buttons for 'New', 'Delete', 'Cancel', and 'Save'. At the bottom of the window is a 'Close' button.

There are four buttons at the bottom of the screen:



- **New** - Allows you create a new booking type.
- **Delete** - Delete an existing booking type.
- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.

### 1.1.5 Order Terms

This tab allows you to maintain order terms. These are added to reports that support them.

The screenshot shows the 'Static Data Maintenance' window with the 'Order Terms' tab selected. The window has a title bar with 'Static Data Maintenance' and a status bar with 'STATIC DATA MAINT v1.27' and 'C-TMS v12.45'. The main area contains a tabbed interface with 'Order Terms' active. Below the tabs, there is a text area for entering terms, with instructions: 'Ensure to take a new line for each Order Term using the Return key. No font formatting (bold/italic/boxed text) will be displayed on the report. To convey important terms use BLOCK CAPITALS or put a dashed line before and after the term.' Below the text area are fields for 'Last Updated Date' and 'Last Updated By', and buttons for 'Cancel', 'Save', and 'Close'.

There are two buttons at the bottom of the screen:

- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.

### 1.1.6 Location Group Name

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



The screenshot shows the 'Static Data Maintenance' window with the 'Location Group Name' tab selected. The window has a title bar with 'Static Data Maintenance' and a status bar with 'STATIC DATA MAINT v1.27' and 'C-TMS v12.45'. The main area contains a table with two columns: 'Group Name' and 'Location ID'. Below the table are four buttons: 'New', 'Delete', 'Cancel', and 'Save'. At the bottom of the window is a 'Close' button.

Group Name	Location ID

There are four buttons at the bottom of the screen:

- **New** - Allows you create a new location group name.
- **Delete** - Delete an existing location group name.
- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.

### 1.1.7 Report Terms Configuration

This tab allows you to maintain report terms. These are added to reports that support them.

The screenshot shows the 'Static Data Maintenance' window with the 'Report Terms Configuration' tab selected. The window has a title bar with 'Static Data Maintenance' and a status bar with 'STATIC DATA MAINT v1.27' and 'C-TMS v12.45'. The main area contains a 'Report' dropdown menu and a 'Report Title' text box. Below these are four text boxes: 'Header Address', 'Supply Chain Address', 'Footer 1', 'Footer 2', 'Footer 3', and 'Footer 4'. At the bottom of the window are four buttons: 'New', 'Delete', 'Cancel', and 'Save'. At the very bottom is a 'Close' button.

There are four buttons at the bottom of the screen:

- **New** - Allows you create new report terms.
- **Delete** - Delete existing report terms.
- **Cancel** - Do not save any changes.
- **Save** - Save any changes that you have made.

