

Overview - Manual Planning

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1.1 Trip Planning and Manipulation

The Trip Planning and Manipulation module provides users with a view of all the trips on a particular schedule. The unscheduled Orders on the Schedule chosen by the user are also displayed. Trips can be created directly within C-TMS from unscheduled Orders or can be created in an external scheduler and then transferred back to C-TMS (for example Aptean Routing & Scheduling - Paragon Edition).

All key information relating to a trip is displayed on the Trip Manipulation form and a mechanism is provided to link back to the Orders that are delivered on the Trip. A number of manipulation functions can be accessed through Trip Manipulation and these are discussed below.

The Postal Region, Planning Region, Location, Weight, RPE and Volume filters allow a user to restrict which Unscheduled Orders they are able to see, this helps to speed up the planning process.

Please note that distance and fuel units, displayed throughout C-TMS, but specifically on the Trip Manipulation form, are configurable. They default to 'Miles' and 'Litres' respectively.

It is possible to configure the fields that are displayed in the Trip Stop and Unscheduled Orders section, thus allowing a user to view the fields that are most relevant to their role.

The key functions are:

1.1.1 Trip Filter

The Trip Filter allows a user to control which Trips they can see.

1.1.2 Apply Order to Trip

Allows any Unscheduled Orders on that Schedule to be applied to a new or existing Trip. By default an Order will be automatically applied to what the system believes to be the most appropriate stops, it is also possible to apply an Order to a specific pair of stops to reduce the need for manual manipulation. When multiple orders are being applied to a trip, the system will try to minimize the number of stops required by selecting the largest trailer type available.

In order to speed up the Scheduling process multi select functionality has been added, thus making it is possible to select multiple orders and add them to a Trip in one go.

If multiple orders are being added to a trip, the system will automatically select the largest trailer available and ?fix? it to the stops when the 2nd order is added. The user can then manually change the trailer assignment as desired. Both assignment method are subject to the same trip validation routines and may still have to be altered before a trip?s status can be changed.

1.1.3 X-dock Order

It is possible to crossdock an Order via one of many locations, for example an Order going from Loc1 to Loc2 can be x-docked via Loc3. An order can be x-docked on a single Trip or multiple Trips.

1.1.4 Validate Trip

Performs validation checks on the selected Trip to ensure that the trip is valid and feasible. If the trip breaks any validation rules these will be reported back to the user. These checks include:

- Ensure that the trip has at least 1 load and unload activity and these activities are in the correct order.
- Ensures that the trip complies with driving regulations such as Drivers Breaks.
- Checks whether the Trip will deliver within the delivery windows of the Orders.
- Ensures that a valid Trailer Type is assigned to the Trip. If a Trailer has been ?fixed? onto a Trip (see Fixed Routes for more details) it will not be overwritten.



1.1.5 Recalculate Distance and Time

Allows the times on a Trip to be recalculated, wait times will be optimised and Drivers Breaks included (this can include an overnight stopover), all departure times will be made unique. This may result in Delivery windows being breached, however, these failures will be reported during Trip Validation.

1.1.6 Set Trip Status

Trip Statuses include ACCEPTED, TENDERED, DELETED, EN-ROUTE. This function allows the status to be changed to another status, there are restrictions to control the changes that are permitted. For instance it may not be valid to change a trip from EN-ROUTE to DELETED.

Trip status changes can be easily viewed and changed using a Waterfall screen, to aid in block changing statuses of trips and seeing any remaining actions to take in the current schedule.

1.1.7 Split Trip

Allows a trip to be split into 2 separate trips. Upon splitting a new trip will be created and Stops below the split point will be placed on the new Trip. Each Trip will then be validated to ensure that it has the relevant SU and CL activities.

1.1.8 Merge Trip

Two trips can be selected and merged together to make 1 trip. Two configurable system options are now possible for this function. Either duplicate Stops will be removed and stops will be combined together where possible, or Stops will be appended onto the end of the resulting trip. Upon completion the first trip will remain and the second trip will be deleted.

1.1.9 Delete Trip

If a trip is no longer required it can be deleted, the trip will remain on the Database with a status of deleted, the stops will be removed and the Orders set back to Unscheduled.

1.1.10 Insert Stop

Allows a new stop to be manually added to a Trip after the selected Stop, an Activity Type, Location and Trailer Type are required.

1.1.11 Append Stop

Allows a stop to be appended to the end of a Trip, an Activity Type, Location and Trailer Type are required.

1.1.12 Delete Stop

Allows a stop to be deleted from a Trip, any Orders at that Stop will be Unscheduled.

1.1.13 Costs and Revenue

Cost and Revenue details are displayed for a Trip, costs can also be allocated to a Trip (see the Accounting documentation for more details as to how these costs are generated).

1.1.14 Assign Resources

Within the Trip Manipulation form it is possible to assign resources to a Trip.

A Carrier can be selected from a list of valid Carriers. It is then possible to populate a Driver (and optionally 2 crew members), Vehicle and Trailer Id. Depending on the set up of the carrier (i.e. Fleet or Haulier) these values will either be selected from a list or entered as free text. If a Haulier is being used the details of all resources may not be stored in C-TMS so they will need to be entered manually. If selecting from a list the list will be restricted to those resources that are available to the Carrier that is assigned to the Trip.

It is also possible to manually assign a Trailer Type to a Trip. If a trailer is manually assigned to a stop it is also assigned to all subsequent stops and is ?Fixed?. The fact that it is fixed means it will not be overwritten by validate trip and gives the user the ability to force a trip to use a particular trailer. A large number of Trips that are created from Fixed Routes will have a trailer ?fixed?. A trailer can be 'un-fixed' by removing it from all stops, once this has happened validate trip will



again try and assign the best fit trailer.

The system can aid you in resource allocation through showing the availability of resources based on their current assignment or availability.

