Aptean

C-TMS Admin

Calidus TMS - 12.48

29th April 2025 - 2.0
Reference: ADMINISTRATION

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1 Imports

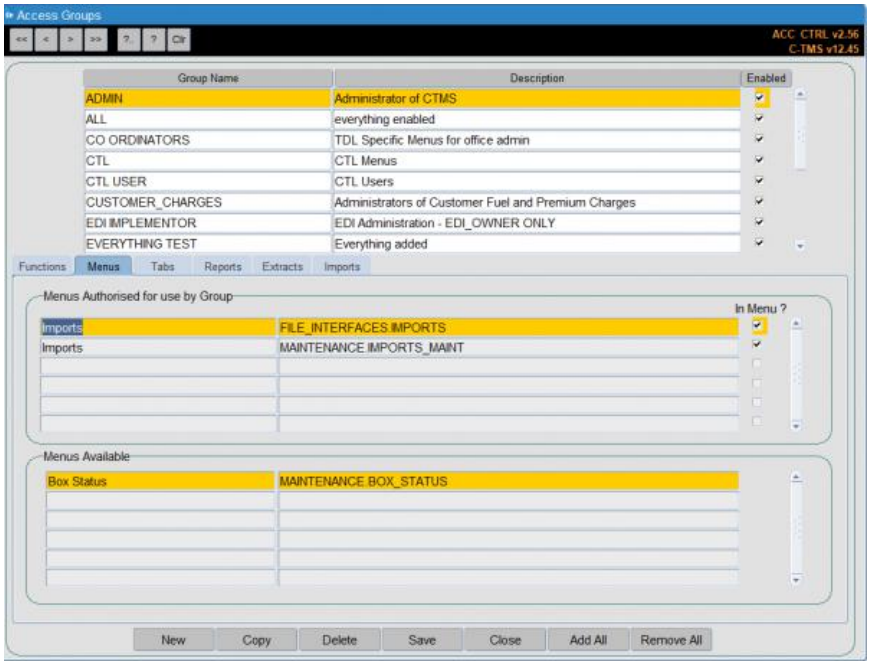
The C-TMS Flat File Import functionality allows for data to be loaded into the system without the need for a formal electronic interface. The import mechanism allows a file from a users PC to be uploaded to the server and from there it can be loaded into the database.

There is a predefined set of import types which have been configured along with the fields which can be included in each import. It is possible to configure these imports to suit individual requirements, for example, on an Order import it is possible to pass in the id for an existing location or it is possible to pass in the name and address for a new location (only the first 2 parts of a postcode are required for a new location to be created) with relevant information such as loading rates automatically being copied from existing locations to their orders. Certain imports also have the concept of a record type allowing 2 types of information to be included in one import such as orders and order lines. Order details can be contained on one line and then one or many orders lines can be included in subsequent lines.

1.1 Access Control

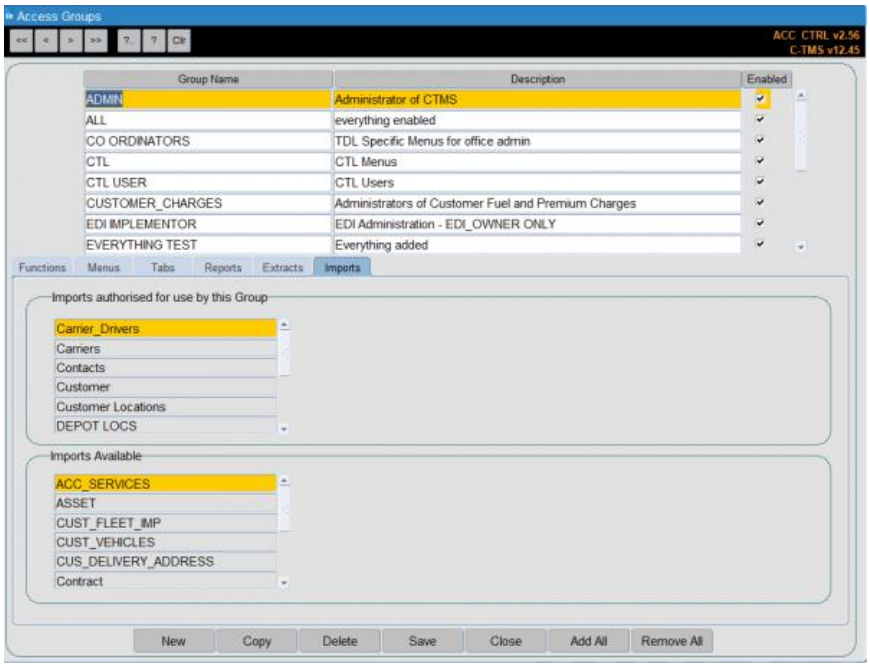
Access to maintain and execute the imports is subject to access control.

To access the maintenance or execution of imports, your user must be part of a group that has access to the screens. You can do this through the Access Control screen, Groups maintenance, Menu tab for your assigned group.



- Imports (FILE_INTERFACES.IMPORTS) - this is for the execution of imports.
- Imports (MAINTENANCE.IMPORTS_MAINT) - this is for the maintenance of imports.

In order to import in a particular format, you also have to have access to the format, which is controlled through the same screen, Imports tab:



In both cases, access is granted by double-clicking the required menu or import on the lower "Available" table to add it to the upper "Authorised" table.

If you do not have privilege to change access control, contact your system administrator for access.

1.2 Import Processing

There are a number of imports that are currently configured including Orders., Bookings, Slots and Receipts.

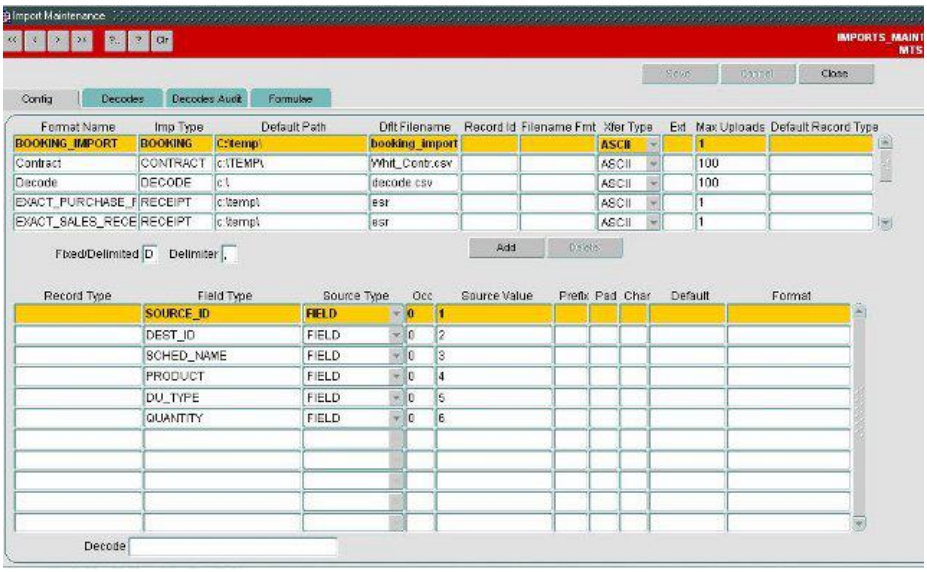
While processing the file C-TMS will attempt to process each line individually, upon completion it will report back to the user the number of lines that were processed successfully and the number that failed. Results and failures files (.res and .fail) are produced and can be viewed on the server to see what happened during the import. Upon completion a record will also be written to an audit table, detailing when the import was run, who ran it, the number of records processed successfully and the number that failed. If the Import was for orders it will also contain a comma separated string of all the orders that were created.

With regard to the Orders imports it is very important to prevent a file from being processed more than once. C-TMS will perform a check to ensure that the same file cannot be loaded twice, this is achieved using the checksum functionality on the server, if a user attempts to load a file that has already been processed it will be rejected. C-TMS also performs checks to ensure that the order being processed is not already in the system, the check is made based on the key fields of an order.

1.3 User Interface

There are 2 screens in C-TMS for imports, one for maintenance and the other for execution as follows:

1.3.1 Maintenance



To create a new import, select a row on the top section and click the **Add** button.

Enter a unique format name.

Enter an import format or select from a lookup using CTRL-L - a list of currently available imports is shown below.

Enter a default path and filename - this is a default LOCAL path and filename on your PCs or network which is used when executing to find the import files. You can change this when executing an import, but is useful as a default.

You may also enter:
- XFer Type - ASCII (character, the default) or BINARY.
- Max Uploads - a maximum number of records that can be uploaded through this import.
- Default Record Type - a default for the records (lines) included in the file.
- Fixed/Delimited - this will default to delimited if unspecified.
- Delimiter - this will default to a comma if unspecified.

You can save your export using the **Save** button provided, or cancel any changes you have made after the last save with the **Cancel** button.

To edit an existing import, you can select it from the top table, and any defined extract fields will be listed below.

To delete an existing import, select the import in the top table and click the **Delete** button.

To add extract fields, select the lower table and click the **Add** button. The screen will take you through the adding of a new field.

If there are multiple record (line) types that can be specified in the import, the screen will automatically show you the available record types. You can select one by clicking on it and clicking OK, or by double-clicking on the data row. You can cancel the addition by clicking the **Cancel** button.

After selecting a record type (or if there is only one record type), the screen will automatically show you a list of fields for that record type. You can select one by clicking on it and clicking OK, or by double-clicking on the data row. You can cancel the addition by clicking the **Cancel** button.

After that, you can specify where the data for this system field comes from:

- FIXED - a fixed value, typed directly in the Source Value column.
- FIELD - a column of data from the inbound file, indicated by a numeric entry in the Source Value column.
- PARAM - a parameter from the execution screen, identified by the Source Value column.
- OMIT - a placeholder. The field will not be imported or set.

You may also specify the following:

- Occ - occurrence of that field

- Prefix - a prefix to add to the start of the field data
- Pad - How may characters to pad the field, if required. Applies to the left i.e. padding to 3 characters with "0", "1" becomes "001", "17" becomes "017", "12345" becomes "123".
- Char - a padding character for the field when padding.
- Default - a default value if the import field is not provided.
- Format - Available formats are defined in the Formulae tab. If selected, one of:
    - COMET - a bespoke format.
    - SSL - a bespoke service level format.
    - PLUS_X - where X is a number to add to a numeric field value.
    - ADD_DAYS_SCHED_OFFSET - an offset to a date, specified in the 4th and 5th parameters.
    - DATE_NEXT_SLOT - the date of the next delivery slot, defined by parameters: 2 - secondary location; 3 - principal location, 4 - Product, 5 - RPE
    - DAY+1WD - the next working day from the date specified.
    - DAYNAME_TO_WKDAYNO - convert a week day number to a human-readable day name.
    - LOC_REF_X - Obtain a location ID by an alternative reference. Various reference types are possible, which will be suffixed to the model prefix "LOC_REF_", eg "LOC_REF_EXT", "LOC_REF_WHS".
    - PRD_REF_X - Obtain a PRODUCT TYPE by an alternative reference. Various reference types are possible, which will be suffixed to the model prefix "PRD_REF_", "PRD_REF_SECTION_DFLT".
    - DU_REF_X - Obtain a DU_TYPE by an alternative reference. Various reference types are possible, which will be suffixed to the model prefix "DU_REF_PRD_DFLT", eg "PRD_REF_SECTION_DFLT".
- Decode - a decode table to lookup a value from the import field value to a system field value. This is covered more in the following section. A lookup list of decodes is provided. If a decode value is not found, the direct import field value is used.

You can add new fields, delete existing fields, edit existing fields and save your changes using the buttons provided.

Note: Typically with each import, there is a record type and action that is required. This is usually specified against the core data record type.

For example, the PERSON import type (for importing drivers and crew) supports the following 3 record type:

- PERSON - the person being imported and its data - the core data.
- CARRIER - the carriers to which this person belongs.
- VEHICLE - any vehicle types that person is capable of using.

The REC_TYPE and ACTION fields are specified against the PERSON record type.

You can use this to your advantage to import multiple record types in a single file.

For example, you might want to import a person, a carrier for that person and some vehicle types that they can use.

Each record might be configured as follows:

- Common:
    - Column 1:REC_TYPE, column 2:ACTION
- PERSON
    - Column 3:PERSON_ID, Column 4:FORENAME, Column 5:SURNAME
- CARRIER
    - Column 3:CARRIER_PERSON_ID, Column 4:CARRIER_ID, Column 5:CARRIER_INACTIVE
- VEHICLE
    - Column 3:VEHICLE_PERSON_ID, Column 4:VEHICLE_TYPE

The import file might look like this:

```
PERSON,A,120,Walker,Jay
CARRIER,A,120,CARRIER1,N
VEHICLE,A,120,VTYPE1
VEHICLE,A,120,VTYPE2
PERSON,A,121,Golding,Harry
CARRIER,A,121,CARRIER1,N
```

Importing this file would create 2 people, both assigned to carrier 1, with the first person assigned to two vehicle types.

1.3.2 Decodes

Decodes are tables of cross-reference data that you can use to convert import values to system values, to account for differences in import data formats.

For example, you have a delivery type STANDARD. All external data import files provide the data, but one field says "STD" instead of "STANDARD". You could create an import decode to change "STD" to "STANDARD" and reference the decode table here.

There are also many different decodes in the system, and some are specifically required for some functionality to operate, usually required decodes for specific interfaces.

Some examples:

- LOGIX Interface
  - *Decode Name*: LOGIX_DU_TYPES
  - *Decode Type*: DU Types
  - *Source Value*: The CTMS DU Type
  - *Target Value*: The Logix DU Type
- LogiNext Interface
  - *Decode Name*: LOGINEXT_DEL_TYPES
  - *Decode Type*: Reference
  - *Source Value*: The CTMS Delivery Type
  - *Target Value*: The LogiNext Delivery Type

Typically, these will be mentioned in the documentation of the specific screens, interfaces or processes as to which decodes are required for certain bespoke functionality to operate as required, and are not listed in this guide.

You create decodes in the Decode import tab.

You can create a new decode table from the top table by clicking the **Add** button on the top section.

You must provide:

- A unique name.
- A type, provided in a drop-down list.

You can save using the Save button and delete the decode table with the Delete button.

When a decode table is selected, the decodes are shown in the lower table. You can edit existing decodes or add new ones with the **Add** button in this section. You can delete decode entries with the **Delete** button.

You must provide:

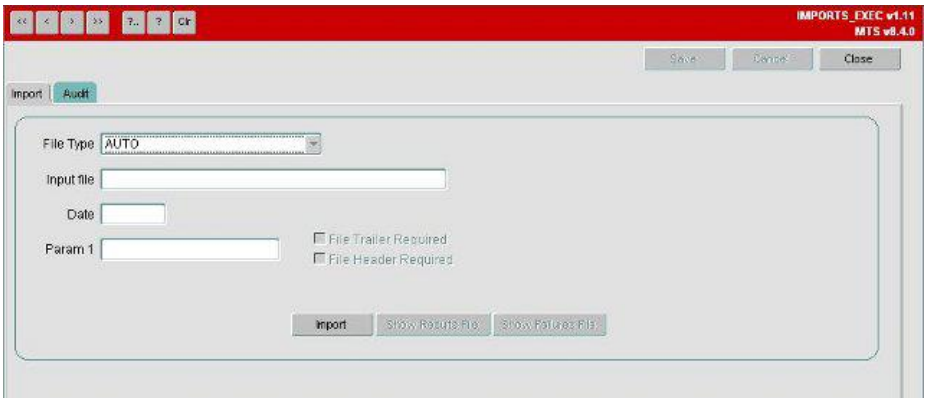
- Source value - the value to be changed.
- Target value - the value to change to.

You may also provide a customer and/or carrier to which this decode pertains. This decode will then only be used if the import references this customer and/or carrier.

Note: You can use the import process itself to import decode tables, by creating an import of import type "DECODE".

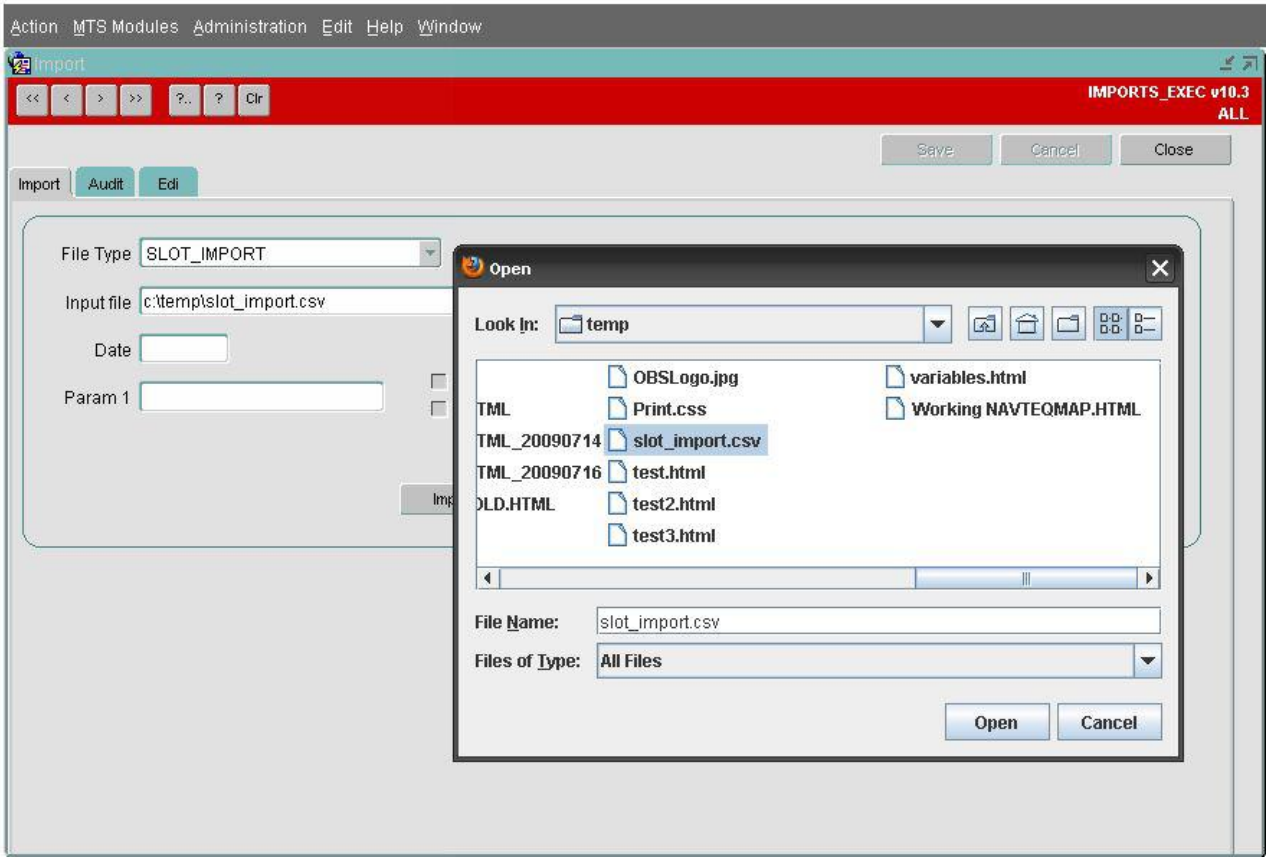
- DECODE

1.3.3 Execution

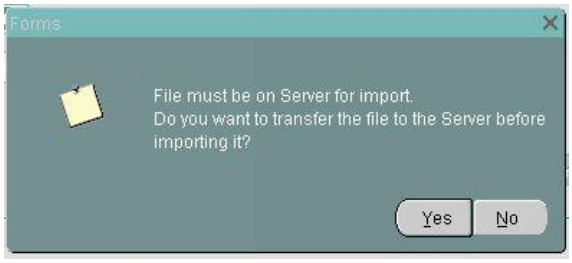


When an import is executed the file must be on the server, the system allows the user to upload the file onto the server if it is not already there.

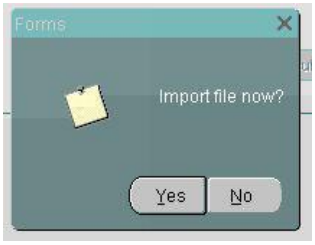
To upload a file onto the server for importing you will need to either accept the default file location for the type of import you are performing or use the **Browse** button to select a file to upload from your PC or a network location that you have access to:



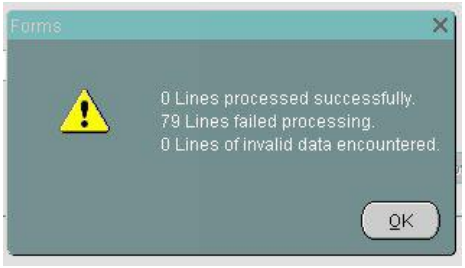
Once the file is found and selected you should click the **Open** Button. This will then prompt you to confirm you wish to upload the file onto the system's server:



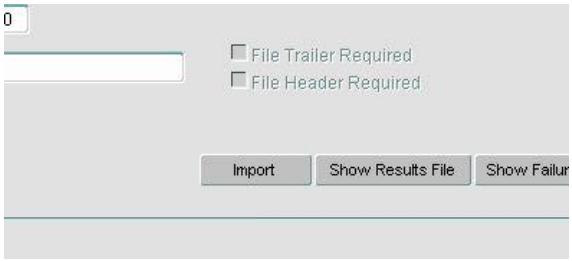
If you click on **Yes** the file will be uploaded onto the server, depending on the import file's size you may be presented with an hour glass whilst the upload occurs. When the upload is complete you will be asked if you wish to proceed with the import:

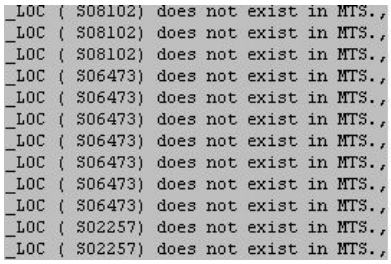


If you click **Yes** you will then be presented with a confirmation message advising what has happened during the import:



If errors occur during the import as above you will notice the **Show Results File** button has become active you will be able to click on this to see why the data was rejected:





The **Show Failure File** will list those records that have failed to upload - this can be downloaded, corrected and then re-uploaded.

1.4 Notes on Validation of Imports

The import fields have strict restrictions, such as particular values, formats, lengths, etc.

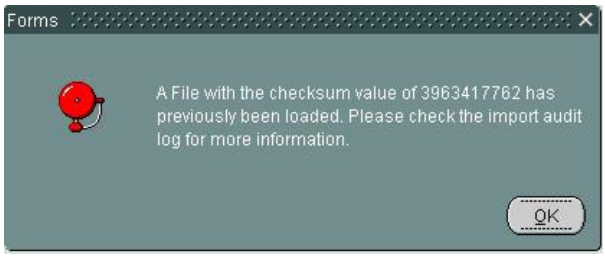
As any field can be decoded through a decode table entry, this restriction applies to the *decoded* value.

Similarly, data can be modified through formulae, amending the data uploaded for a particular field. Any fields which apply formulas will have the restrictions applied to the *transformed* data.

If there is no decode or formula, then the data you attempt to upload *must* abide by the stated restrictions, otherwise the system will reject the data.

To preserve database integrity and prevent duplicate data being imported, every CSV file has a unique numeric identifier, not visible to the user. This is called the "checksum value".

The system will prevent a file import if the content is identical to a previously uploaded file. For example, if an import is executed and completes ok, then the exact same file is attempted to be uploaded, with which the content remains unchanged from the first import, the following error message is displayed:



In this instance the data will already have been uploaded onto the system.

1.5 Currently Available Imports

A variety of imports are available in the C-TMS system, and bespoke imports are developed when required by the business. A current list of the imports available are described below:

Import	Description
ACCOUNT	This import allows users to upload Accounts into C-TMS. This import allows for addition, modification or deletion of account data.
ACC_SERVICES	This import allows users to upload Services into C-TMS. This import allows for addition and modification of additional services.
ACC_SRV_RTS	This import allows users to upload Account Service Requirements into C-TMS. This import allows addition ONLY.
ASSET	This import allows users to upload permanent assets into C-TMS. This allows for creation and modification of permanent assets.
BAX_DEL_TYPE	
BAX_ROUTE	
BOOKING	This import allows users to upload Bookings into C-TMS. This import allows 3 different types: BOOKING, BOOKINGS_ASN and BOOKINGS_MDD.
CARRIER	This import allows you to upload Carriers into C-TMS. This allows for addition, modification or deletion of carriers.
CARRIER_LANE	This import allows users to upload Carrier Lanes into C-TMS
CONTRACT	This import allows users to upload Contracts into C-TMS
CURR_USAGE	This import allows users to upload Account Currency Usage records into C-TMS. This import allows for addition or deletion of currency usage data.
CUSTOMER	This import allows you to upload Customers into C-TMS
CUST_FLEET	

Import	Description
	This import allows users to upload Customer Fleets into C-TMS. Note that this is specific to Fleet Maintenance users (Bespoke)
DEBRIEF	This import allows users to upload basic debrief information against a location on a trip into C-TMS. This includes signatory and arrival/departure date/time, and sets the orders at that location to POD confirmed.
DECODE	This import allows users to upload Import/Export Decodes into C-TMS
DEL_SCHEDULE	This import allows users to upload into C-TMS
DRIVERS	This import allows users to be uploaded Drivers into C-TMS. This allows for addition, modification or deletion of basic driver details. **Note:** The PERSON import supersedes this import and should be used instead.
DRIVER_SHIFT	This import allows users to allocate Drivers to Shift Patterns into C-TMS. This allows for Addition, modification or deletion of driver shift patterns.
DU_TYPE	This import allows users to upload Despatch Unit Types|Despatch Unit Types into C-TMS
FIXED_ROUTE	This import allows users to upload Fixed Routes into C-TMS. This allows for addition, modification or deletion of fixed routes, stops and transport modes.
GAZ_DHL_ESD	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_MOVIANTO	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_POLARSP	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_UKMAIL	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_UKM_PO	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_UKM_SE	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_AC	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_CF	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_CY	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_DE	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_DP	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_DS	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_FE	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_HA	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_RE	This import allows users to upload Carrier Gazetteers into C-TMS
GAZ_YODEL_SE	This import allows users to upload Carrier Gazetteers into C-TMS

Import	Description
INVOICE_RQTS	This import allows users to upload Invoice Requirements into C-TMS. This import allows for addition, modification or deletion of account invoice requirements data.
LANE	This import allows users to upload Lanes into C-TMS
LOCATION	This import allows users to upload Locations into C-TMS. This import allows addition ONLY of locations, constraints, contacts, references and trailer types.
LOC_PRD_FACT	This import allows users to upload location product factors into C-TMS
LOC_UPDATE	This import allows users to upload updated locations into C-TMS. This import allows update ONLY of basic location address details.
LOC_ZONES	This import allows users to upload Location Zones into C-TMS
MILK_ROUND	
ORD_LINE_ITM	This import allows users to upload Orders into C-TMS. Note that orders can be added, modified or deleted through this interface.
PARAGONXDOCK	
PAR_DEL_DATE	
PAR_TRIP_DTL	
PAR_XDOCKS	
PERSON	This import allows users to upload Drivers into C-TMS. This import allows for addition, modification or deletion of drivers details (record type PERSON, the core type), carrier assignment (CARRIER) and allowed vehicle types (VEHICLE).
PORTAL	This import is used by portal when uploading Orders from Portal.
PROCESS_ITEM	This is a bespoke interface for Toyota items.
PROC_ITM_FIX	
PRODUCT	This import allows users to upload Product information into C-TMS
PROD_ITEMS	This import allows users to upload Product Items into C-TMS
RECEIPT	This import allows users to upload Receipts into C-TMS
REGION_DATA	This import allows users to upload Region mapping into C-TMS. This import allows for addition, modification or deletion of region data.
REGION_DEPOT	This import allows users to upload Region assignments to Depot into C-TMS. This import allows for addition, modification or deletion of region depot assignment data.
RES_AVAIL	This import allows users to upload Resource Availability exceptions into C-TMS
SCHED_RULES	This import allows users to upload Schedule Rules into C-TMS. This import allows for addition and modification of scheduling rules per cost centre, customer, service level and transport mode.

Import	Description
SCREENING	This import allows users to upload Customer Screening Charges into C-TMS. Note that this is bespoke functionality
SHIFT_PATT	This import allows users to upload Depot Shift Patterns into C-TMS. This import allows for addition, modification or deletion of shift patterns per depot.
SKU_ORDER	This import allows users to upload SKU?s into C-TMS
SLOT	This import allows users to upload Slot details into C-TMS
TEAMS	This import allows users to upload Teams into C-TMS. Note that this is bespoke to Sessions Collections processing only.
TI_ORDER	This import allows users to upload Orders into C-TMS. Note that orders can only be added or deleted through this interface, not modified.
TRACTOR	This import allows users to upload Tractors into C-TMS. This import allows addition, modification or deletion of tractors and the carrier to which they are assigned.
TRAILER	This import allows users to upload Trailers into C-TMS. This import allows for addition, modification or deletion of trailers.
TYRES	This import allows users to upload Tyres cross-reference data into C-TMS. Note that this is bespoke for Fleet Maintenance processes only.
VEHICLE	This import allows users to upload Vehicles into C-TMS. This import allows addition, modification or deletion of fixed vehicles (linked tractor and trailer) and the carriers to which they are assigned.
VOLUMETRICS	This import allows users to upload Product Vehicle volumes data into C-TMS.
WMS_PRODUCT	This import allows users to upload WMS Product cross-reference data into C-TMS. Note that this is bespoke and used for Brexit export processes only.
XDOCK_PATH	This import allows users to upload XDock_Paths into C-TMS.
ZONE_CHGS	This import allows users to upload Location Zone Surcharges into C-TMS.

1.6 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
BKG_INCREMENT	Increment exiting Bookings on import rather than overwriting	SYSTEM
BKG_SLOT_INACTIVATE	Controls whether existing Slots are updated to INACTIVE during a Slot Import.	SYSTEM
CLIENT_CODE_CHECK	Client code assessment for Location import	SYSTEM
CONTINGENCY_IMPORT	Contingency Import setting	COST_CENTRE
FIXED_IMPORT	Customer is using fixed order import	CUSTOMER

Parameter	Description	Level
GEO_LOC_IMP_POST_PLAN	Populate the postal and planning regions using rules in country and static data when doing location import	SYSTEM
GEO_SLOT_IMPORT_FILE	Name of Slot Import file	SYSTEM
GEO_SLOT_IMPORT_PATH	Slot Import path	SYSTEM
IMP_BWSC_DEF_CARRIER	Default Carrier for BWSC import for self delivery suppliers	COST_CENTRE
IMP_CARRIER_LANE_COUNTRY_CODE	Country code for each cost centre imported on Carrier_Lane - INDUSTRIAL	COST_CENTRE
IMP_COL_DATE_REQD	Collection Date must be specified for imports	COST_CENTRE
IMP_CREATE_ITEM_ID	Controls if Item identifiers are system generated in CSV	CUSTOMER
IMP_FULL_LOC_ADDR_MATCH	Check the addresses match for the location name, address line 1, postcode, country and type for imported orders before creating a new location (Y/N).	SYSTEM
IMP_LOC_ID_ONLY	Only validate the location id when importing orders not the address lines	SYSTEM
IMP_OVERRIDE_SOURCE_REF	Set source system and control additional functionality in ORD_LINE_ITM CSV order import	SYSTEM
IMP_RESET_ORD_WINDOWS	Reset Order windows during Import	COST_CENTRE
IMP_RESET_ORD_WINDOWS	Reset Order windows during Import	CUSTOMER
IMP_TI_ORDER_CALC_WEIGHTS	CSV Import - Calculate weights from dims(Y=X*Y*Z/6000)	COST_CENTRE
IMP_TI_ORDER_CHECK_SMS	CSV Import - Check contact numbers can be used as SMS numbers	COST_CENTRE
IMP_TI_ORDER_DEFAULT_DU	CSV Import - Default DU Type Method	COST_CENTRE
IMP_TI_ORDER_GEN_ITEMS	CSV Import - Generate order items from Qty	COST_CENTRE
IMP_TI_ORDER_GEN_LOC	CSV Import - Location Name generation by Post Code	COST_CENTRE
IMP_TI_ORDER_QTY_ADD	CSV Import - Add line qty	COST_CENTRE
IMP_TI_ORDER_REVENUE_LIMIT	CSV Import -Pre-call above revenue limit (Numeric Limit).0 means no pre-call	COST_CENTRE
IMP_TI_ORD_GEN_LOC_NAME	Send Supplier Collection Messages	CUSTOMER
IMP_USE_DEFAULT_DU	Use Default DU Type in import	CUSTOMER
IMP_USE_DEFAULT_DU	Use Default DU Type in import	CUSTOMER
IMP_USE_GERMAN_DECODE	Controls if location names are decoded from German	SYSTEM
OMS_UNIQUE_EXT_REF	Controls if imports can load multiple order lines	CUSTOMER
ORD_BOOKING_METHOD	CSV Import - Booking Method -HOME for home delivery, any other value for standard	COST_CENTRE
ORD_CHECK_DUPLICATE_ORDERS	For orders where source system is IMPORTS check to see if order is a duplicate - Y or N	SYSTEM

Parameter	Description	Level
PORTAL_ORDERS	Portal Imports available	SYSTEM
PRD_ITEM_IMPORT_FILE	Name of Product Item Import file	SYSTEM
PRD_ITEM_IMPORT_PATH	Product Item Import path	SYSTEM
SCH_SCHED_ORD_IMP_IGGESUND_SCHED_DATE_OVERRIDE	When Importing IGGESUND data, can the sched_date be over-written by the SCH_SCHED_ORD_DERIVE rule?	SYSTEM
SCH_SCHED_ORD_IMP_TI_ORDER_SCHED_DATE_OVERRIDE	When Importing TI_ORDER data, can the sched_date be over-written by the SCH_SCHED_ORD_DERIVE rule?	SYSTEM
UTL_IMPORT_IGNORE_INVALID_OPERATION	The import process of files will suppress the auditing of messages when a file does not exist on the server to overwrite (Y/N)	SYSTEM
ZONE_POSTCODE_CHECK	Does Zone import check the postcode	SYSTEM

2 Extracts

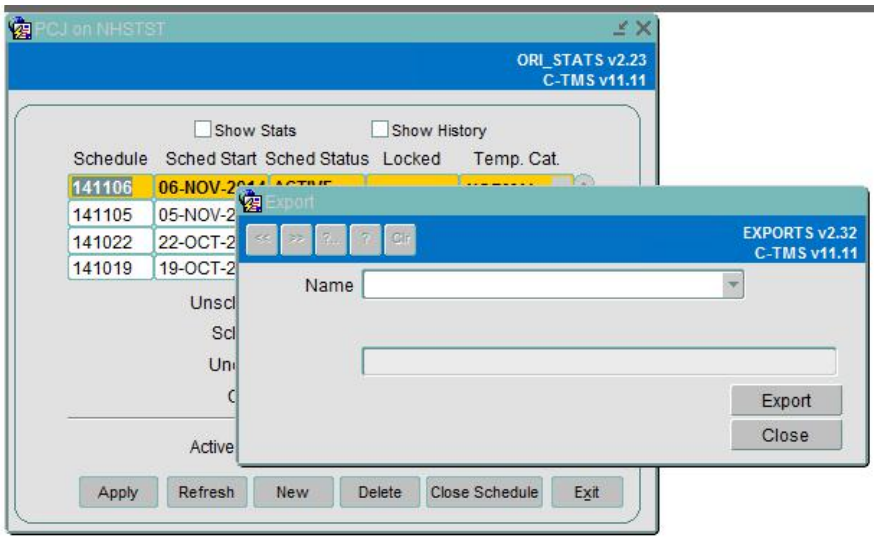
C-TMS Exports provides the users with Extracts of data that are required for day to day operations, finance and management reporting.

Requirements for particular exports are defined by the business and once exports have been developed and installed onto C-TMS, they are available to users via the Exports form.

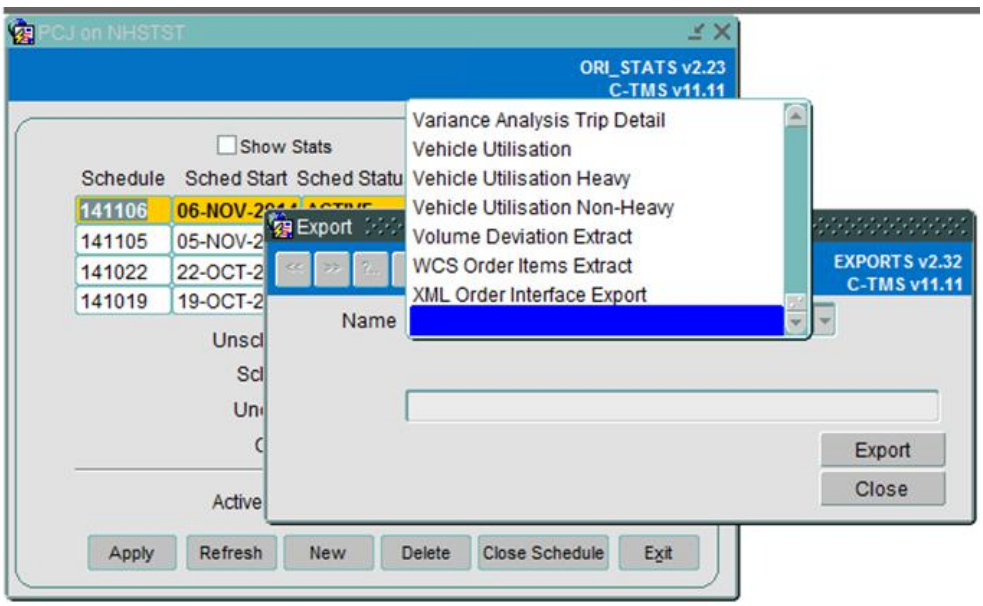
C-TMS Exports can be accessed from the C-TMS Modules menu

2.1 Generating Exports

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

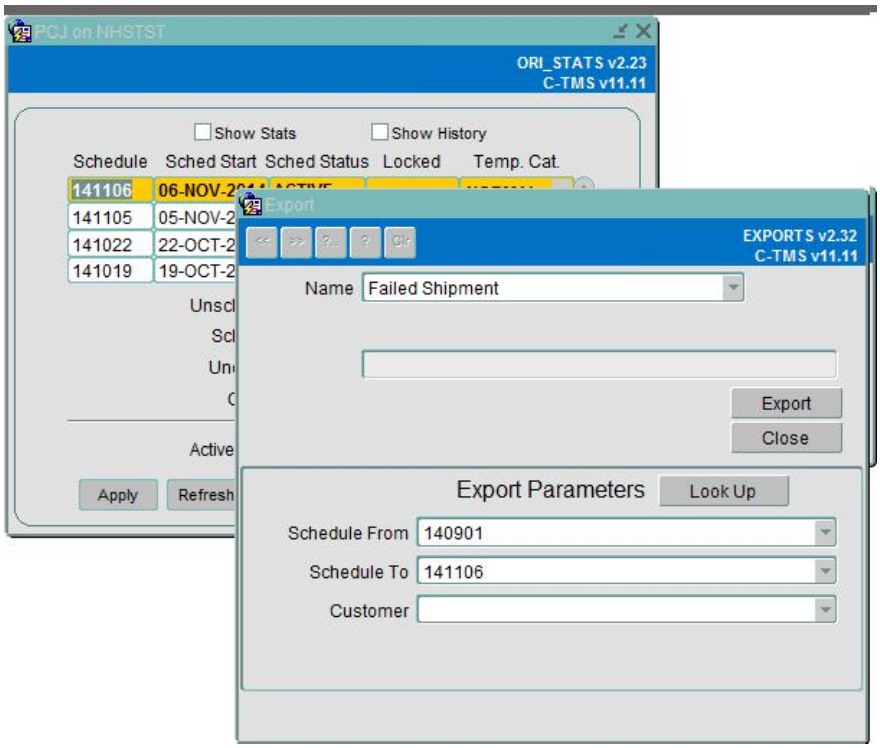


Select the required extract from the drop down field. Based on the Extract that you are selecting a list of parameters for generating the Extract will be displayed as shown below.



Note: User access to particular exports is controlled by the Administration section of C-TMS and is maintained by administrator users of the system. See the ADM section for further information.

In this example, we will look at generating the Failed Shipment. Once the Failed Shipment option is selected, the list of parameters for generating the Extract will be prompted as shown below. Based on the Extract that you are selecting the parameters will vary.



Note: Some parameters are mandatory, others are optional. Some exports do not require any input from the user.

Enter the From, To Schedule and Customer details and click on the **Export** button to generate the extract. You can save the file to your PC, the method will differ depending on which browser you are using.

Once you have saved the file you can open it in an application on your PC to view or edit.

2.2 Available Extracts

The following is a list of common available extracts. There are other bespoke extracts that may also be used. At latest count there are over 240 extracts.

Export	Description
Accruals	The information for this export is collated from the Payments and display payment details
Carrier Invoice	This is an export of payments which have been invoiced for a particular invoice number
Carrier completed trips	This is an export of the all the Trips completed by a carrier during a specified period.
Carrier non completed trips	This is an export of the all the Trips that have not been completed (POD applied) by a carrier during a specified period.
CTM Carrier Responsiveness	The information for this is collated from the Sch_Trip Audit table
CTM Trips Not Responded to	This export is used by the planner to check which carriers have not responded to a tender invitation for a trip
Commercial	This provides an extract of orders in C-TMS in a particular format
Contracts	This export, extracts all contract details within the C-TMS system in a certain format. .
Customer Invoice	This is an export of payments which have been invoiced for a particular invoice number
Customer Invoice By Dates	This is an export of payments which have been invoiced between two Depot Exits by Hour (Loads) This export shows which products were unloaded - in hourly chunks on a range of dates
	This export shows which products were unloaded - in hourly chunks on a range of dates in RPE

Export	Description
Depot Exits by Hour (RPE)	
Equipment Moves	The export extracts all of the equipment (DU Type) despatches, receipts, returns and exchanges. You can select by From/To Date/Time, Customer, Carrier and Owning Depot. The extract lists the following information: Action Date, Type, Customer, Planned Date, Actual Date, MTS Ref, Cust Ref, Del DU Type, Planned Del Qty, Carrier, Ticket Received, Trip, From Loc, To Loc, Stop, Action DU Type, Prev Qty, New Qty, Move, User
Extract Lane	The export, extracts all the lanes for a particular customer and or cost centre
Fixed Route Extracts	This export, will extract fixed routes, for a particular carrier or depot
KPI by Lane	The export allows planners to analyse the quality of the plan against the KPI?s to be achieved. The results are restricted by choice of schedule.
Kraft KPI	This shows a list of trips with orders for a range of dates for a particular cost centre
Lane Extract	This export, extracts lanes which have been set up for , customer, cost Centre, From Location and To
Load Schedule CSV	This export shows trips which have been loaded and unloaded at a particular Depot between a specified date range.
Location Delivery Pre Warning	This export show trips, which have loaded or unloaded at a specific depot between a specified range of dates in a specified status.
Message Maintenance	This export extracts ALL recipients which have been set up to receive emails & faxes along with the email address/ fax numbers
Order Savings	This export extracts data from the Savings table for a specified range of schedules.
Pre-Invoice Check	This export writes out a list of debit_accounts which are ready for invoicing.
Schedule	This export, writes out a list of trips and orders on a schedule between a date range specified
Schedule Trip CS	The export, writes out details of orders which have been schedule onto trips for a specified customer.
Store Pre-Warning	This export, extracts orders which have been created via the bookings module
Trip Actuals	This export writes out trip details which have been passed into ISOTRAK, for a specified schedule
Variance Analysis Store Detail	This extract write out planned and actual DU?s and RPE?s for all locations for a specified schedule.
Variance Analysis Summary	This extracts summaries totals from the SCH_Product_Summary table for a date range specified
Variance Analysis Trip Detail	This extracts writes out planned and Actual DU?s and RPE?s from the Sch_Order_Line table for a specified schedule.

A series of extracts relating to WCS Scanning has been created - these are available in section Extracts - WCS Scanning.

A list of all extracts including their parameters is shown in section Extracts List.

3 Extracts - WCS Scanning

A number of existing extracts exist for the monitoring the WCS scanning process. These request several common parameters.

The exact parameters of each report are shown below, but the following shows detailed descriptions of how these parameters will work;

- Date Range - required date range, filtering by default to one day's data, from today's date. The To date will default to the same date - both From and To date may be modified by the user.
- Date and Time Range - filtering by default to one day's data, from today's date at 00:00 to Today's date at 23:59. The To date will default to the From date - both From and To date and time may be modified by the user.
- Schedule or Schedule Range - required schedule or range of schedules, selecting from drop-down lists.
- Customer - a drop-down list of Auto Alliance customers, with an option to select All, many or 1.
- Asset - A lookup list of all available assets in the system. May be left blank to select all values. Allows direct typing of the selected value.
- Asset Type - select from a list of asset types.
- Driver/User ID - a lookup of all drivers, allowing selection of one, many or all. May be left blank to select all values. Allows direct typing of the selected value.
- Last Scan Location - a lookup list of all locations associated to the customer selected (if selected), allowing selection of one, many or all. May be left blank to select all values. Allows direct typing of the selected value.
- Dealer - as above, but limited only to dealership locations.
- Depot - a drop-down list of all Owning Depots, with an option to select one, many or all.
- Route - a lookup list of all routes created within C-TMS for the selected owning depot, allowing selection of one, many or all. May be left blank to select all values. Allows direct typing of the selected value.
- Media Type - a lookup list of all media types within the system, allowing selection of one, many or all. May be left blank to select all values. Allows direct typing of the selected value.

3.1 AA Trip and Order Detail

The report will allow selection of the following parameters;

- Start Schedule - required.
- Carrier
- Group Name (Required)
- Activity

The report will extract the information from the Trip and Order data and will display;

- The criteria used for selection
- The selected data with titles for each column

The data items shown will be as follows;

- Order Status,
- From Location Id,
- From Location Name,
- To Location Id,
- To Location Name,
- Postcode,
- Postal Region,
- Planning Region,
- Current Location Id,
- Current Location Name,
- Customer,
- Order Cost Centre,
- Order Schedule,
- OMS Ref,
- Booking Ref,
- Booked In,
- Customer Ref,
- Del Point Ref,

- Shipping Ref,
- Group Name,
- Early Collect,
- Late Collect,
- Early Delivery,
- Late Delivery,
- Product Type,
- DU Type,
- Planned DU Quantity,
- Planned Weight,
- Cases,
- Planned RPE Quantity,
- Actual DU Quantity,
- Actual Dispatched,
- Actual Delivered,
- Actual Weight,
- Special Instructions,
- Order Comments,
- Lane Comments,
- Delivery Type,
- Order Cost Revenue,
- Order Cost VAT,
- Allocated from Trip,
- Order Revenue,
- Order VAT,
- Container No.,
- POD CMR No.,
- Non-Conformance Reason Codes,
- Created By,
- Created Date,
- Last Modified By,
- Last Modified Date,
- Trip Schedule,
- Trip Status,
- Trip Number,
- Start Time,
- Departure Time,
- Stop No,
- Planned Arrive,
- Actual Arrive,
- Planned Depart,
- Actual Depart,
- Activity Name,
- Trailer Type,
- Trailer ID,
- Owning Depot,
- Trip Cost Centre,
- Carrier,
- Trip Ref,
- Driver,
- Vehicle,
- Seal No,
- Planned Distance,
- Total Elapsed Time,
- Total Drive Time,
- Trip Currency,
- Trip Cost,
- Trip Allocable Cost,
- Trip VAT,
- Customer Fuel Charge,
- Customer Premium Charge,
- POD Received Date,
- KM from previous Stop,
- Stop Type,
- Actual Distance,

- Route Code,

3.2 Asset Dwell

The report will allow selection of the following parameters;

- Asset Type

The report will extract the information from the Asset and Audit data and will display;

- The criteria used for selection
- The selected data with titles for each column

The data items shown will be as follows;

- Asset ID,
- Asset Type,
- Current Location,
- Location Name,
- Alt Date,
- Dwell Days

3.3 Asset History

	01/12 thru 03/12	BMW	Asset					Driver/User id	Time and Date
FILTEI	Date	Customer	Asset	Media type	Scan Location	Vehicl	Traile	Driver/User	Scan Detail
	01-Dec	BMW	1234	LRC	Pineham	AB12 DEF	AA001	John	06:15
	01-Dec	BMW	1234	LRC	Halewood	DE25 KLP	N/A	Fred	02:15
	01-Dec	BMW	1234	LRC	B123	DE65 POL	N/A	Dave	13:35
	02-Dec	BMW	1234	LRC	Halewood	AB12 DEF	AA001	John	06:15
	02-Dec	BMW	1234	LRC	Pineham	DE25 KLP	N/A	Fred	02:15
	02-Dec	BMW	1234	LRC	Cirencester	DE65 POL	N/A	Dave	13:35
	02-Dec	BMW	1234	LRC	B456	HT57 ABC	N/A	Bill	12:15
	03-Dec	BMW	1234	LRC	Cirencester	AB12 DEF	AA001	John	06:15
	03-Dec	BMW	1234	LRC	Pineham	DE25 KLP	N/A	Fred	02:15
	03-Dec	BMW	1234	LRC	B987	DE65 POL	N/A	Dave	13:35
	03-Dec	BMW	1234	LRC	Pineham	HT57 ABC	N/A	Bill	14:45

The report will allow selection of the following parameters;

- Date and Time Range - required, filtering on scan date.
- Customer
- Asset
- Driver/User ID

The report will extract the information from the Order Item and Audit data and will display;

- The criteria used for selection
- The selected data with titles for each column

The data items shown will be as follows;

- Scan Date - the date of the scan
- Customer - the customer code
- Asset - The Asset ID
- Media Type - the DU Type of the asset
- Scan Location - the location description
- Location Name
- Vehicle - the Tractor ID
- Trailer - the Trailer ID
- Driver/User ID - the driver forename and surname concatenated, separated by a space.
- Scan Time - The time of scan.

- Scan Activity - Whether Loading, Unloading, etc
- Scan Process - the application scanning the item

3.4 Asset Status

This report is intended to show the last location of items scanned. The report will report all items that match the criteria, and display the information against the items, with the date and time of the last scan.

	Date	BMW	Asset		Last Scan in C-TMS		Time and Date
FILTER	Date	Customer	Asset	Media type	Dealer	Quantity	Scan Detail
Sub totals	01-Dec	BMW			Pineham	2	
	01-Dec	BMW			Halewood	1	
	01-Dec	BMW			Dealers	6	
	01-Dec	BMW			In Transit	2	
Summary	01-Dec	BMW		LRC		4	
	01-Dec	BMW		SRC		7	
FILTEI	Date	Customer	Asset	Media type	Dealer	Quantity	Scan Detail
	01-Dec	BMW	1234	LRC	B123	1	06:15
	01-Dec	BMW	2345	SRC	B123	1	02:15
	01-Dec	BMW	3456	SRC	Pineham	1	13:35
	01-Dec	BMW	5433	SRC	B123	1	12:15
	01-Dec	BMW	2211	SRC	Halewood	1	10:33
	01-Dec	BMW	1111	SRC	B123	1	03:30
	01-Dec	BMW	5555	SRC	Pineham	1	12:40
	01-Dec	BMW	3212	SRC	B123	1	09:10
	01-Dec	BMW	6789	LRC	B123	1	09:09
	01-Dec	BMW	8765	LRC	In Transit	1	11:30
	01-Dec	BMW	5544	LRC	In Transit	1	11:45

The report will allow selection of the following parameters;

- Customer
- Asset
- Last Scan Location

The report will extract the information from the Order Item and Audit data and will display;

- The criteria used for selection
- A series of sub-total rows with titles for each column
- A series of summary rows
- The selected data with titles for each column.

The data items shown will be as follows;

- Last Scan Date - the date of the scan
- Customer - the customer code
- Asset - The Asset ID
- Media Type - the DU Type of the asset
- Last Scan Location - the location ID
- Quantity - the number of items scanned (expected to be 1)
- Last Scan Time - The time of scan.
- Scan Type - Whether Loading, Unloading, etc

The Sub-total section will show the following items, sub-totalled at Date, Customer and Dealer;

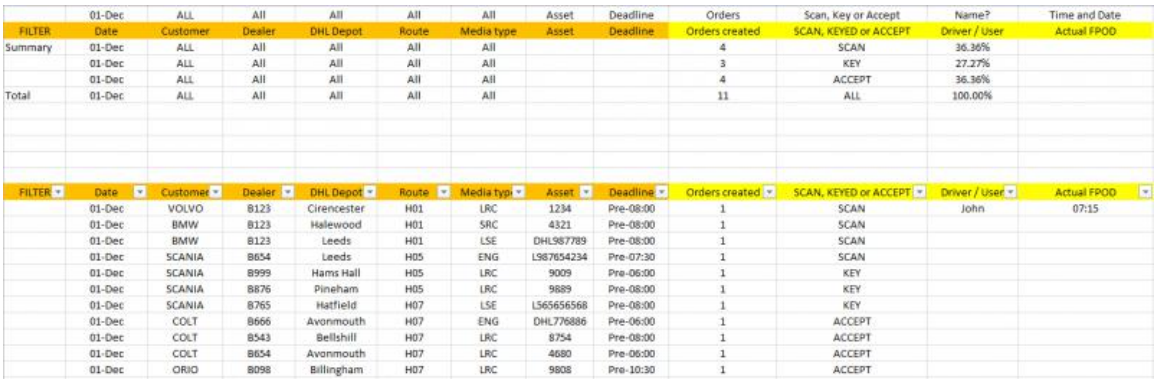
- Quantity

The summary section will show the following items, sub-totalled at Date, Customer and Media Type;

- Quantity

3.5 Driver Scanning

This report is intended to show how the driver collected or delivered goods from or to the dealership, through the Microlise data captured.



	01-Dec	ALL	All	All	All	All	Asset	Deadline	Orders	Scan, Key or Accept	Name?	Time and Date
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders created	SCAN, KEYED or ACCEPT	Driver / User	Actual FPOD
Summary	01-Dec	ALL	All	All	All	All			4	SCAN	36.36%	
	01-Dec	ALL	All	All	All	All			3	KEY	27.27%	
	01-Dec	ALL	All	All	All	All			4	ACCEPT	36.36%	
Total	01-Dec	ALL	All	All	All	All			11	ALL	100.00%	

FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders created	SCAN, KEYED or ACCEPT	Driver / User	Actual FPOD
	01-Dec	VOLVO	B123	Cirencester	H01	LRC	1234	Pre-08:00	1	SCAN	John	07:15
	01-Dec	BMW	B123	Halewood	H01	SRC	4321	Pre-08:00	1	SCAN		
	01-Dec	BMW	B123	Leeds	H01	LSE	DHL987789	Pre-08:00	1	SCAN		
	01-Dec	SCANIA	B654	Leeds	H05	ENG	L987654234	Pre-07:30	1	SCAN		
	01-Dec	SCANIA	B999	Hams Hall	H05	LRC	9009	Pre-06:00	1	KEY		
	01-Dec	SCANIA	B876	Pineham	H05	LRC	9889	Pre-08:00	1	KEY		
	01-Dec	SCANIA	B765	Hatfield	H07	LSE	L565656568	Pre-08:00	1	KEY		
	01-Dec	COLT	B666	Avonmouth	H07	ENG	DHL776886	Pre-06:00	1	ACCEPT		
	01-Dec	COLT	B543	Bellshill	H07	LRC	8754	Pre-08:00	1	ACCEPT		
	01-Dec	COLT	B654	Avonmouth	H07	LRC	4680	Pre-06:00	1	ACCEPT		
	01-Dec	ORIO	B098	Billingham	H07	LRC	9808	Pre-10:30	1	ACCEPT		

The report will allow selection of the following parameters;

- Date Range - required, filtering on scan date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data (generated from Microlise data only) and will display;

- The criteria used for selection
- Titles for each column
- A series of summary rows with titles for each column, with a total row.
- The selected data with titles for each column.

The data items shown will be as follows;

- Date - the date of the scan
- Customer - the customer code
- Dealer - the Dealership location ID
- DHL Depot - The Owning Depot Code
- Route - the Route Code (if there is one)
- Activity
- Media Type - the DU Type of the asset
- Asset or Item information, including:

o Asset - the Asset ID o Pallet ID o Item Weight o Item Volume

- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Actual Time
- Count - Orders Created (assumed 1)
- Scanned
- Scan Type - SCAN, KEYED or ACCEPT - the scan type from the Item Audit (see section 2.3.11 above for details)
- Scan Time
- Driver Percentage
- Driver/User ID - the driver forename and surname concatenated, separated by a space.

The summary section will show the following items, sub-totalled at Date and Scan Type;

- Orders Created
- Percentage of total

A total line will be shown for ALL scan types.

3.6 On Time Arrivals

The report will allow selection of the following parameters;

- Schedule Range - required, filtering on planned collection date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for Microlise scans of collection return orders only and will display;

- The criteria used for selection
- A summary line with titles for each column
- The selected data with titles for each column

The data items shown will be as follows;

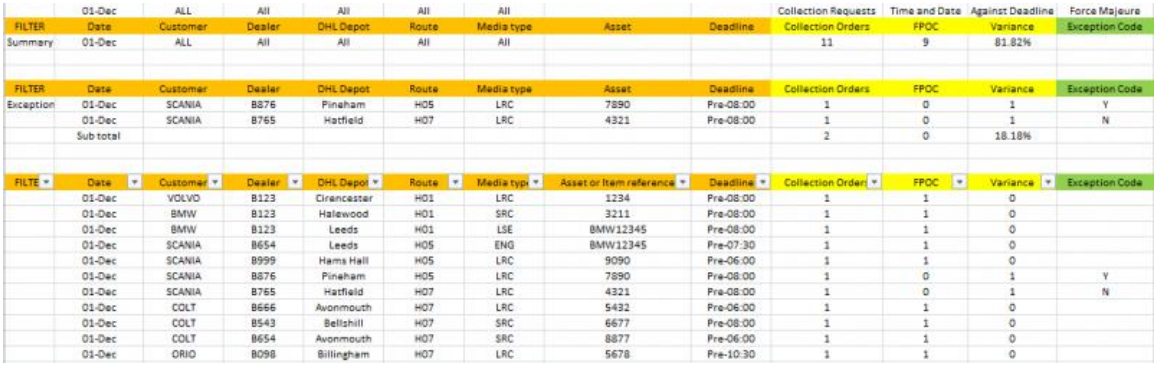
- Schedule Name- the date the item was scanned collected
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- DHL Depot - The Owning Depot Code
- Depot Name
- Load Depot
- Load Depot Name
- Route - the Route Code (if there is one)
- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Drops
- Actual FPOC
- On Time
- Exception Code - the reason code entered against the item
- Force Majeure - Whether this reason code is designated Force Majeure (see section 2.3.1.4 above for details).

The summary section will show the following items, sub-totalled at Date;

- On Time
- Exceptions
- Variance (against deadline)

3.7 On Time Returns

This report is a measure of all requested web portal orders, collected on-time, or at all. This measures on-time versus the cut-off time held against the dealership, rather than versus the planned collection time.



	01-Dec	ALL	All	All	All	All			Collection Requests	Time and Date	Against Deadline	Force Majeure
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Collection Orders	FPOC	Variance	Exception Code
Summary	01-Dec	ALL	All	All	All	All			11	9	81.82%	

FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Collection Orders	FPOC	Variance	Exception Code
Exception	01-Dec	SCANIA	B876	Pineham	H05	LRC	7890	Pre-08:00	1	0	1	Y
	01-Dec	SCANIA	B765	Hatfield	H07	LRC	4321	Pre-08:00	1	0	1	N
	Sub total								2	0	18.18%	

FILTE	Date	Customer	Dealer	DHL Depot	Route	Media typ	Asset or Item reference	Deadline	Collection Order	FPOC	Variance	Exception Code
	01-Dec	VOLVO	B123	Cirancester	H01	LRC	1234	Pre-08:00	1	1	0	
	01-Dec	BMW	B123	Halewood	H01	SRC	3211	Pre-08:00	1	1	0	
	01-Dec	BMW	B123	Leeds	H01	LSE	BMW12345	Pre-08:00	1	1	0	
	01-Dec	SCANIA	B654	Leeds	H05	ENG	BMW12345	Pre-07:30	1	1	0	
	01-Dec	SCANIA	B999	Hams Hall	H05	LRC	9090	Pre-06:00	1	1	0	
	01-Dec	SCANIA	B876	Pineham	H05	LRC	7890	Pre-08:00	1	0	1	Y
	01-Dec	SCANIA	B765	Hatfield	H07	LRC	4321	Pre-08:00	1	0	1	N
	01-Dec	COLT	B666	Avonmouth	H07	LRC	5432	Pre-06:00	1	1	0	
	01-Dec	COLT	B543	Bellshill	H07	SRC	6677	Pre-08:00	1	1	0	
	01-Dec	COLT	B654	Avonmouth	H07	SRC	8877	Pre-06:00	1	1	0	
	01-Dec	ORIO	B098	Billingham	H07	LRC	5678	Pre-10:30	1	1	0	

The report will allow selection of the following parameters;

- Date Range - required, filtering on planned collection date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for Microlise scans of collection return orders only and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column, with a total row
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date and time the return item was scanned collected
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- DHL Depot - The Owning Depot Code
- Depot Name
- Route - the Route Code (if there is one)
- Media Type - the DU Type of the asset
- Asset or Item Reference
- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Actual FPOC
- Collection Orders (assuming 1)
- FPOC - the final POC proof of collection date and time
- Variance - 0 if the item was undelivered with a reason code, else 1
- Exception Code - the reason code entered against the item
- Force Majeure - Whether this reason code is designated Force Majeure (see section 2.3.1.4 above for details).

The summary section will show the following items, sub-totalled at Date;

- Collection Orders
- FPOC
- Variance (against deadline)

The Exception section will show the following items in detail, summarised at Date, Customer, Dealer, DHL Depot, Route and Force Majeure:

- Date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

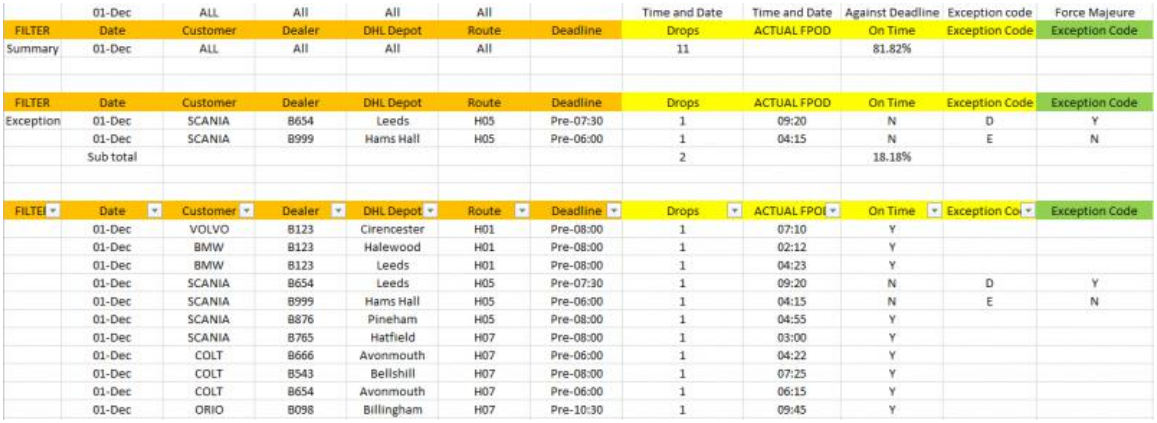
- Deadline
- Collection Orders (sub-totalled)
- FPOC (assumed 0)
- Variance (qty) (as Collection Orders)
- Force Majeure

A total row will summarise at Date, Customer, Dealer, DHL Depot, Route and Media Type:

- Date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type
- Collection Orders
- FPOC
- Variance (qty versus total)

3.8 On Time Drops

This report is intended to show On Time Drops rather than the following On Time Items, the major difference that this report is based on the trip stops at a location, rather than quantity of items. Note that this report requires manual debriefing of the stops in C-TMS.



	01-Dec	ALL	All	All	All		Time and Date	Time and Date	Against Deadline	Exception code	Force Majeure
FILTER	Date	Customer	Dealer	DHL Depot	Route	Deadline	Drops	ACTUAL FPOD	On Time	Exception Code	Exception Code
Summary	01-Dec	ALL	All	All	All		11		81.82%		
FILTER	Date	Customer	Dealer	DHL Depot	Route	Deadline	Drops	ACTUAL FPOD	On Time	Exception Code	Exception Code
Exception	01-Dec	SCANIA	B654	Leeds	H05	Pre-07:30	1	09:20	N	D	Y
	01-Dec	SCANIA	B999	Hams Hall	H05	Pre-06:00	1	04:15	N	E	N
	Sub total						2		18.18%		
FILTE	Date	Customer	Dealer	DHL Depot	Route	Deadline	Drops	ACTUAL FPOI	On Time	Exception Co	Exception Code
	01-Dec	VOLVO	B123	Cirencester	H01	Pre-08:00	1	07:10	Y		
	01-Dec	BMW	B123	Halewood	H01	Pre-08:00	1	02:12	Y		
	01-Dec	BMW	B123	Leeds	H01	Pre-08:00	1	04:23	Y		
	01-Dec	SCANIA	B654	Leeds	H05	Pre-07:30	1	09:20	N	D	Y
	01-Dec	SCANIA	B999	Hams Hall	H05	Pre-06:00	1	04:15	N	E	N
	01-Dec	SCANIA	B876	Pineham	H05	Pre-08:00	1	04:55	Y		
	01-Dec	SCANIA	B765	Hatfield	H07	Pre-08:00	1	03:00	Y		
	01-Dec	COLT	B666	Avonmouth	H07	Pre-06:00	1	04:22	Y		
	01-Dec	COLT	B543	Bellshill	H07	Pre-08:00	1	07:25	Y		
	01-Dec	COLT	B654	Avonmouth	H07	Pre-06:00	1	06:15	Y		
	01-Dec	ORIO	B098	Billingham	H07	Pre-10:30	1	09:45	Y		

The report will allow selection of the following parameters;

- Date Range - required, filtering on planned delivery date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the C-TMS Trip Stops of delivery orders only and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column, with a total row
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned delivered
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- Load Depot - The Loading Depot Code
- Depot Name

- Route - the Route Code (if there is one)
- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Drops (assuming 1)
- Actual FPOD - the final POD proof of delivery date and time
- On Time - N if the delivery was before the cut-off time, else Y
- Exception Code - the reason code captured for any exceptions
- Exception Code - Whether this reason code is designated Force Majeure (see section 2.3.1.4 above for details). This column will be headed Force Majeure

The summary section will show the following items, subtotalled at Date:

- Drops
- On Time (Percentage of total On Time versus the total orders)

The Exception section will show the following items summarised at Date, Customer, Dealer, DHL Depot and Route and Force Majeure, for each item with a reason code attached;

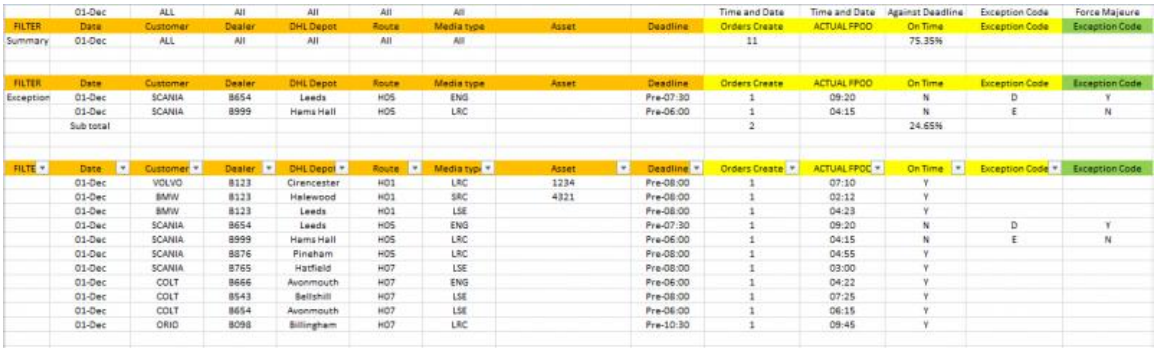
- Date
- Customer
- Dealer
- DHL Depot
- Route
- Deadline
- Drops
- Actual FPOD
- Percentage of On Time
- Force Majeure

A total row will summarise;

- Drops
- On Time (Percentage of total not On Time versus the total orders)

3.9 On Time Items

The On Time Items is very similar to On Time Drops, but shows each item asset ID for each of the drops, reporting to Item level. Drops are assumed to be delivery stops in the traffic plan for the trip.



	01-Dec	ALL	All	All	All	All			Time and Date	Time and Date	Against Deadline	Exception Code	Force Majeure
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders Create	ACTUAL FPOD	On Time	Exception Code	Exception Code
Summary	01-Dec	ALL	All	All	All	All			11		75.35%		
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders Create	ACTUAL FPOD	On Time	Exception Code	Exception Code
Exception	01-Dec	SCANIA	8654	Leeds	HO5	ENG		Pre-07:30	1	09:20	N	D	Y
	01-Dec	SCANIA	8999	Hams Hall	HO5	LRC		Pre-06:00	1	04:15	N	E	N
	Sub total								2		24.65%		
FILTE	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders Create	ACTUAL FPOD	On Time	Exception Code	Exception Code
	01-Dec	VOLVO	8123	Cirencester	HO1	LRC	1234	Pre-08:00	1	07:10	Y		
	01-Dec	BMW	8123	Halewood	HO1	SRC	4321	Pre-08:00	1	02:12	Y		
	01-Dec	BMW	8123	Leeds	HO1	LSE		Pre-08:00	1	04:23	Y		
	01-Dec	SCANIA	8654	Leeds	HO5	ENG		Pre-07:30	1	09:20	N	D	Y
	01-Dec	SCANIA	8999	Hams Hall	HO5	LRC		Pre-06:00	1	04:15	N	E	N
	01-Dec	SCANIA	8876	Pineham	HO5	LRC		Pre-08:00	1	04:55	Y		
	01-Dec	SCANIA	8765	Hatfield	HO7	LSE		Pre-08:00	1	03:00	Y		
	01-Dec	COLT	8666	Avonmouth	HO7	ENG		Pre-06:00	1	04:22	Y		
	01-Dec	COLT	8543	Bellshill	HO7	LSE		Pre-08:00	1	07:25	Y		
	01-Dec	COLT	8654	Avonmouth	HO7	LSE		Pre-06:00	1	06:15	Y		
	01-Dec	ORIO	8098	Billingham	HO7	LRC		Pre-10:30	1	09:45	Y		

- note the %age values appear incorrect in this example but serve to describe the formatting of the output.

The report will allow selection of the following parameters;

- Date Range - required, filtering on planned delivery date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for Microlise scans of delivery orders only and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column, with a total row
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned delivered
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- DHL Depot - The Owning Depot Code
- Depot Name
- Route - the Route Code (if there is one)
- Media Type - the DU Type of the asset
- Asset or Item details, including:

o Asset or Item o Child Asset o Pallet ID o Item Weight o Item Volume

- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Orders Created (assuming 1)
- Actual FPOD - the final POD proof of delivery date and time
- On Time - N if the delivery was before the cut-off time, else Y
- Exception Code - the reason code captured for any exceptions
- Exception Code - Whether this reason code is designated Force Majeure (see section 2.3.1.4 above for details). This column will be headed Force Majeure

The summary section will show the following items, subtotalled at Date:

- Orders Created
- On Time (Percentage of total On Time versus the total orders)

The Exception section will show the following items summarised at Date, Customer, Dealer, DHL Depot and Route and Force Majeure, for each item with a reason code attached;

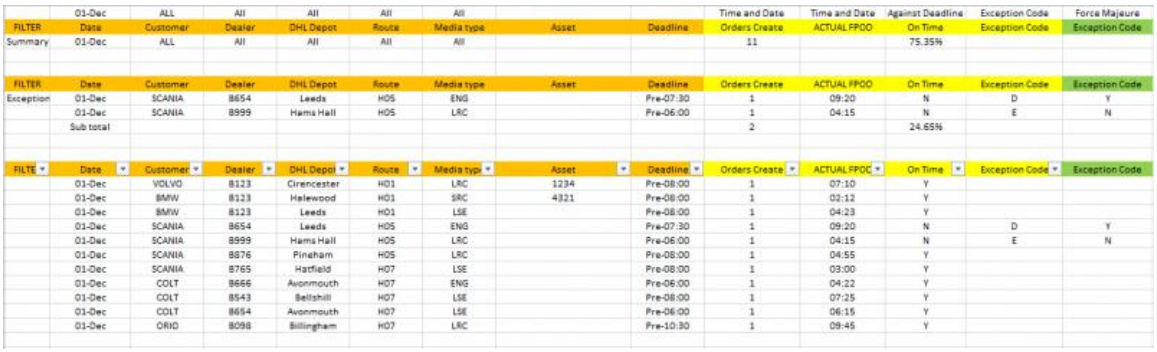
- Date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type
- Deadline
- Drops
- Actual FPOD
- Percentage of On Time
- Force Majeure

A total row will summarise;

- Orders Created
- On Time (Percentage of total not On Time versus the total orders)

3.10 On Time Items (Assets)

The On Time Items (Assets) report is very similar to On Time Items, but shows each item asset ID for each of the drops, reporting to Item level. Drops are assumed to be delivery stops in the traffic plan for the trip.



	01-Dec	ALL	All	All	All	All			Time and Date	Time and Date	Against Deadline	Exception Code	Force Majeure
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders Create	ACTUAL FPOD	On Time	Exception Code	Exception Code
Summary	01-Dec	ALL	All	All	All	All			11		75.35%		
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders Create	ACTUAL FPOD	On Time	Exception Code	Exception Code
Exception	01-Dec	SCANIA	8654	Leeds	H05	ENG		Pre-07:30	1	09:20	N	D	Y
	01-Dec	SCANIA	8999	Hams Hall	H05	LRC		Pre-06:00	1	04:15	N	E	N
	Sub total								2		24.65%		
FILTE	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Orders Create	ACTUAL FPOD	On Time	Exception Code	Exception Code
	01-Dec	VOLVO	8123	Cirencester	H01	LRC	1234	Pre-08:00	1	07:10	Y		
	01-Dec	BMW	8123	Halewood	H01	SRC	4321	Pre-08:00	1	02:12	Y		
	01-Dec	BMW	8123	Leeds	H01	LSE		Pre-08:00	1	04:23	Y		
	01-Dec	SCANIA	8654	Leeds	H05	ENG		Pre-07:30	1	09:20	N	D	Y
	01-Dec	SCANIA	8999	Hams Hall	H05	LRC		Pre-06:00	1	04:15	N	E	N
	01-Dec	SCANIA	8876	Pineham	H05	LRC		Pre-08:00	1	04:55	Y		
	01-Dec	SCANIA	8765	Hatfield	H07	LSE		Pre-08:00	1	03:00	Y		
	01-Dec	COLT	8666	Avonmouth	H07	ENG		Pre-06:00	1	04:22	Y		
	01-Dec	COLT	8543	Bellshill	H07	LSE		Pre-08:00	1	07:25	Y		
	01-Dec	COLT	8654	Avonmouth	H07	LSE		Pre-06:00	1	06:15	Y		
	01-Dec	ORIO	8098	Billingham	H07	LRC		Pre-10:30	1	09:45	Y		

- note the %age values appear incorrect in this example but serve to describe the formatting of the output.

The report will allow selection of the following parameters;

- Date Range - required, filtering on planned delivery date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for Microlise scans of delivery orders only and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column, with a total row
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned delivered
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- DHL Depot - The Owning Depot Code
- Depot Name
- Route - the Route Code (if there is one)
- Media Type - the DU Type of the asset
- Asset or Item details, including:

o Asset or Item o Pallet ID o Item Weight o Item Volume

- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Orders Created (assuming 1)
- Actual FPOD - the final POD proof of delivery date and time
- On Time - N if the delivery was before the cut-off time, else Y
- Exception Code - the reason code captured for any exceptions
- Exception Code - Whether this reason code is designated Force Majeure (see section 2.3.1.4 above for details). This column will be headed Force Majeure

The summary section will show the following items, subtotalled at Date:

- Orders Created
- On Time (Percentage of total On Time versus the total orders)

The Exception section will show the following items summarised at Date, Customer, Dealer, DHL Depot and Route and Force Majeure, for each item with a reason code attached;

- Date
- Customer

- Dealer
- DHL Depot
- Route
- Media Type
- Deadline
- Drops
- Actual FPOD
- Percentage of On Time
- Force Majeure

A total row will summarise;

- Orders Created
- On Time (Percentage of total not On Time versus the total orders)

3.11 Outbound Shortage

This output shows orders with FPOD date and time captured and highlights exceptions where FPOD is missing, at an item level.

	01-Dec	ALL	All	Halewood	All	All			Time and Date	Time and Date	Shortage
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Order Create	FPOD	Variance
Summary	01-Dec	ALL	All	Halewood	All	All			11	9	2

FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Order Create	FPOD	Variance
Exceptions	01-Dec	SCANIA	B999	Halewood	H05	LRC	4455		1	0	1
	01-Dec	COLT	B654	Halewood	H07	LSE	DHL432234		1	0	1

FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Deadline	Order Create	FPOD	Variance
	01-Dec	VOLVO	B123	Cirencester	H01	LRC	1234	Pre-08:00	1	1	0
	01-Dec	BMW	B123	Halewood	H01	SRC	4321	Pre-08:00	1	1	0
	01-Dec	BMW	B123	Leeds	H01	LSE	DHL987789	Pre-08:00	1	1	0
	01-Dec	SCANIA	B654	Leeds	H05	ENG	L987654321	Pre-07:30	1	1	0
	01-Dec	SCANIA	B999	Hams Hall	H05	LRC	4455	Pre-06:00	1	0	1
	01-Dec	SCANIA	B876	Pineham	H05	LRC	5566	Pre-08:00	1	1	0
	01-Dec	SCANIA	B765	Hatfield	H07	LSE	DHL998899	Pre-08:00	1	1	0
	01-Dec	COLT	B666	Avonmouth	H07	LRC	7788	Pre-06:00	1	1	0
	01-Dec	COLT	B543	Bellshill	H07	LRC	9988	Pre-08:00	1	1	0
	01-Dec	COLT	B654	Avonmouth	H07	LSE	DHL432234	Pre-06:00	1	0	1
	01-Dec	ORIO	B098	Billingham	H07	LRC	6677	Pre-10:30	1	1	0

The report will allow selection of the following parameters;

- Date Range - required, filtering on Planned Despatch date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for WCS scans of loaded delivery orders only and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned loaded
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- DHL Depot - The Owning Depot Code
- Depot Name
- Route - the Route Code (if there is one)

- Media Type - the DU Type of the asset
- Asset or Item Reference details, consisting of:

o Asset ID o Pallet ID o Item Weight o Item Volume

- Deadline - the CUTOFF held against the Dealership Location, formatted with ?Pre-? (see section 2.3.1.1 above for details)
- Order Create (assuming 1)
- Actual FPOD - the final POD proof of delivery date and time
- Variance - 0 if the item was not loaded for the order, else 1

The summary section will show the following items, sub-totalled at Date and DHL Depot;

- Order Create
- FPOD
- Variance (against deadline)

The Exception section will show the following items in detail, for each item with a reason code attached;

- Date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type
- Asset or Item
- Order Create
- FPOD
- Variance (qty)

3.12 Cross Dock

This report is intended to show a comparison of everything scanned in to and out of a cross-dock location, to help highlight items lost on the floor.

	01-Dec	ALL	All	Halewood	All	All		Time and Date	Time and Date	
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Scanned IN	Scanned OUT	Variance
Summary	01-Dec	ALL	All	Halewood	All	All		9	7	2
FILTER	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Scanned IN	Scanned OUT	Variance
Exception	01-Dec	SCANIA	B999	Halewood	H05	LRC	8888	1	0	1
	01-Dec	COLT	B654	Halewood	H07	LSE	DHL009998	1	0	1
FILTEI	Date	Customer	Dealer	DHL Depot	Route	Media type	Asset	Scanned IN	Scanned OUT	Variance
	01-Dec	VOLVO	B123	Halewood	H01	LRC	1234	1	1	0
	01-Dec	BMW	B234	Halewood	H01	SRC	4323	1	1	0
	01-Dec	BMW	B345	Halewood	H01	LSE	DHL345543	1	1	0
	01-Dec	SCANIA	B654	Halewood	H05	ENG	DHL987789	1	1	0
	01-Dec	SCANIA	B999	Halewood	H05	LRC	8888	1	0	1
	01-Dec	SCANIA	B876	Halewood	H05	LRC	5678	1	1	0
	01-Dec	SCANIA	B765	Halewood	H07	LSE	DHL776655	1	1	0
	01-Dec	COLT	B666	Halewood	H07	ENG	L987789987	1	1	0
	01-Dec	COLT	B543	Halewood	H07	LSE	L543345543	1	1	0
	01-Dec	COLT	B654	Halewood	H07	LSE	DHL009998	1	0	1
	01-Dec	ORIO	B098	Halewood	H07	LRC	6543	1	1	0

The report will allow selection of the following parameters;

- Date and Time Range - required, filtering on scan date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for WCS scans of loaded and unloaded delivery orders at out-bases only and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name
- DHL Depot - The Owning Depot Code
- Depot Name
- Unload Route Code- the Unload Route Code (if there is one)
- Load Route Code- the Load Route Code (if there is one)
- Movement
- Media Type - the DU Type of the asset
- Asset or Item Reference details, consisting of:

o Asset ID o Pallet ID o Item Weight o Item Volume o Item Qty

- Scanned In - Whether the item was scanned in on the date
- Variance
- Scanned Out - whether the item was scanned out on the date
- Variance - 0 if the item was not loaded for the order, else 1

The summary section will show the following items, sub-totalled at Date and DHL Depot;

- Scanned In
- Scanned Out
- Variance (difference between scanned in and out)

The Exception section will show the following items in detail, for each item with a reason code attached;

- Date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type
- Asset or Item
- Scanned In
- Scanned Out
- Variance (qty)

Note: This report will show variances where an item is scanned in and out at the out-base on different days.

3.13 Receipt Scanning

	01-Dec	BMW	All	Pineham	All	All		Time and Date	Time and Date	
FILTER	Date	Customer	Dealer	ORIGIN Depot	Route	Media type	Asset	Orders Created	Positive Load Scan	Variance
Summary	01-Dec	BMW	All	Pineham	All	All		11	9	2

FILTER	Date	Customer	Dealer	ORIGIN Depot	Route	Media type	Asset	Orders Created	Positive Load Scan	Variance
Exception	01-Dec	BMW	B999	Pineham	P10	LRC	2345	1	0	1
	01-Dec	BMW	B654	Pineham	P07	LSE	DHL009998	1	0	1

FILTEI	Date	Customer	Dealer	ORIGIN Dep	Route	Media type	Asset	Orders Created	Positive Load Scan	Variance
All	01-Dec	BMW	B123	Pineham	P10	LRC	1234	1	1	0
	01-Dec	BMW	B234	Pineham	P01	SRC	3211	1	1	0
	01-Dec	BMW	B345	Pineham	P04	LSE	DHL987655	1	1	0
	01-Dec	BMW	B654	Pineham	P06	ENG	DHL987665	1	1	0
	01-Dec	BMW	B999	Pineham	P10	LRC	2345	1	0	1
	01-Dec	BMW	B876	Pineham	P03	LRC	5678	1	1	0
	01-Dec	BMW	B765	Pineham	P07	LSE	DHL776655	1	1	0
	01-Dec	BMW	B666	Pineham	P07	ENG	L987789987	1	1	0
	01-Dec	BMW	B543	Pineham	P10	LSE	L543345543	1	1	0
	01-Dec	BMW	B654	Pineham	P07	LSE	DHL009998	1	0	1
	01-Dec	BMW	B098	Pineham	P10	LRC	6543	1	1	0

The report will allow selection of the following parameters;

- Date Range - required, filtering on scan date
- Customer
- Dealer
- DHL Depot
- Route
- Media Type

The report will extract the information from the Order Item and Audit data for WCS unloading scans of collection orders at DHL Depots only (not out-bases) and will display;

- The criteria used for selection
- A summary line with titles for each column
- A list of all exceptions encountered with titles for each column
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned
- Customer - the customer code
- Dealer - the Dealership location ID
- Dealer Name - The dealership name
- Origin Depot - The Depot Code at which the order originated
- Depot Name - the origin depot name
- Route Code - the Route Code (if there is one)
- Media Type - the DU Type of the asset
- Asset or Item Reference details, containing

o Asset o Child Item o Pallet ID o Item Weight o Item Volume

- Items Created (assuming 1)
- Positive Load Scan - the load scan of the item at the origin depot
- Variance - 0 if the item was unloaded but not loaded for the order, else 1

The summary section will show the following items, sub-totalled at Date and Origin Depot;

- Items Created
- Positive Load Scan
- Variance

The Exception section will show the following items in detail, for each item with no positive load scan;

- Date
- Customer
- Dealer
- Origin Depot
- Route

- Media Type
- Asset or Item
- Orders Created
- Positive Load Scan
- Variance

3.14 Volume or Activity

This output shows the quantity and volumetric of items despatched from each originating depot.

	01/12 thru 04/12	All	All	Pineham	All	All			
FILTER	Date	Customer	Dealer	Owning Depot	Route	Media type	QUANTITY	Conversion	LCE
Summary	01/12 thru 04/12	All	All	Pineham	All	All	37		31
FILTE	Date	Customer	Dealer	Owning Dep	Route	Media type	QUANTITY	Conversion	LCE
	01-Dec	BMW	B123	Pineham	P10	LRC	5	1	5
	01-Dec	BMW	B123	Pineham	P10	SRC	6	0.5	3
	01-Dec	BMW	B123	Pineham	P10	LSE	3	0.2	0.6
	01-Dec	BMW	B123	Pineham	P10	ENG	2	2	4
	02-Dec	BMW	B123	Pineham	P10	LRC	5	1	5
	02-Dec	BMW	B123	Pineham	P10	LRC	5	1	5
	02-Dec	BMW	B123	Pineham	P10	LSE	4	0.2	0.8
	03-Dec	BMW	B123	Pineham	P10	ENG	3	2	6
	03-Dec	BMW	B123	Pineham	P10	LSE	2	0.2	0.4
	03-Dec	BMW	B123	Pineham	P10	LSE	1	0.2	0.2
	04-Dec	BMW	B123	Pineham	P10	LRC	1	1	1

The report will allow selection of the following parameters;

- Date Range - required, filtering on Scheduled Despatch date
- Customer
- Dealer
- DHL Depot (Note: Although this is referred to as Owning depot, there is no functional difference between this and DHL depot)
- Route
- Media Type

The report will extract the information from the Order Detail data and will display;

The criteria used for selection

- A summary line with titles for each column
- The selected data with titles for each column

The data items shown will be as follows;

- Date - the date the return item was scanned
- Customer - the customer code
- Dealer - the Dealership location ID
- DHL Depot - The Owning Depot Code
- Route - the Route Code (if there is one)
- Media Type - the DU Type of the asset
- Quantity (despatched from the depot)
- Conversion - the RPE conversion factor of the media type
- LCE - total RPE for that line.

The summary section will show the following items, sub-totalled at Date and DHL Depot:

- Quantity
- LCE (total)

3.15 WCS Location Snapshot

The report itemises all successful scans as well as damages and errors.

The data items shown will be as follows;

- From Name
- Coll Sched
- Coll Trip
- Coll Bay
- Early Del
- To Loc
- To Name
- Del Sched
- Del Trip
- Del Status
- Del Bay
- DU Type
- Item ID
- Ordered
- Despatched
- Item Location
- Reason Code
- Reason Description

3.16 WCS Order Items Extract

The report shows all order items and unload con-conformances.

The report will allow selection of the following parameters;

- Date Range - required, filtering on Scheduled Despatch date
- Customer
- Trip

The report will extract the information from the items data and will display;

- The date and time run
- The report name and criteria used for selection
- The selected data with titles for each column

The data items shown will be as follows;

- Order
- Trip
- Customer
- External Ref
- Product Type
- DU Type
- Item ID
- Item AKA
- Item Desc

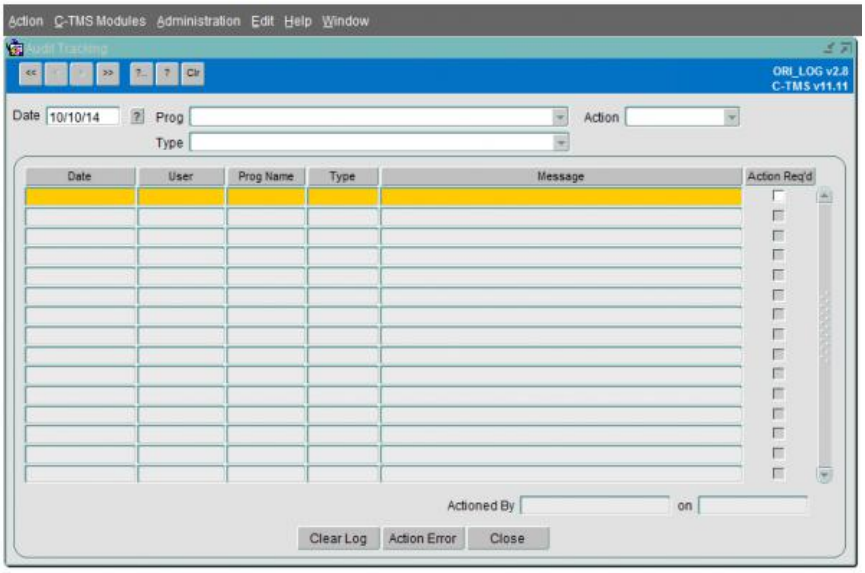
- Item Factor
- Qty Ordered
- Qty to Deliver
- Unload Non-conformance Reason
- Unload Non-conformance

4 Audit Log

The C-TMS Audit Log Screen provides the users with informational messages regarding the processes on C-TMS.

C-TMS Audit Log can be accessed from the C-TMS Modules menu.

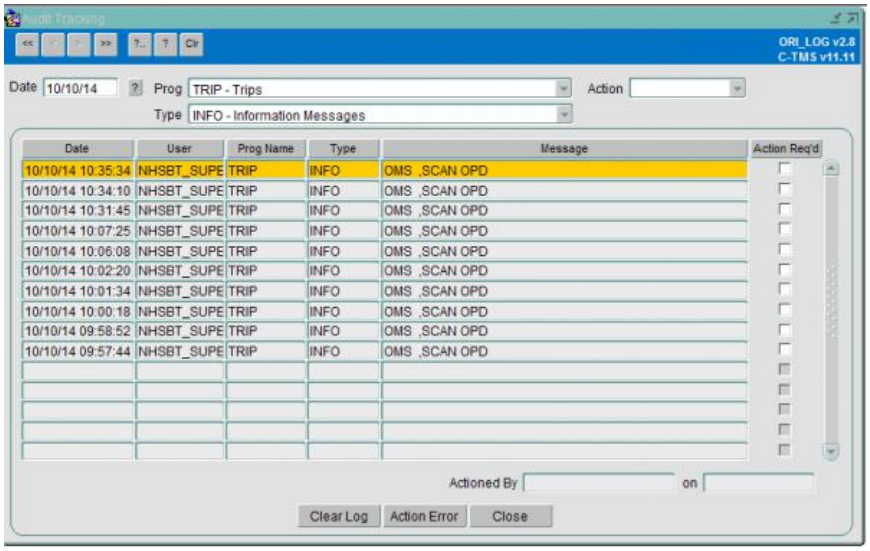
Once selected the form as shown below will be displayed.



4.1 Audit log search

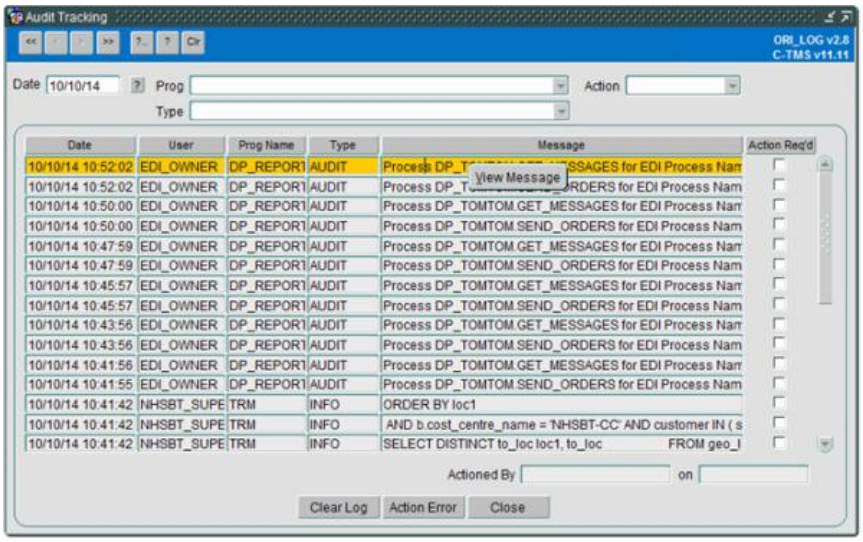
Enter the date for which you require the audit information. Click on the question mark to return the information. The information can be filtered on:

1. The program that generated the audit log
2. The type of record
3. Whether the record is actioned or un-actioned

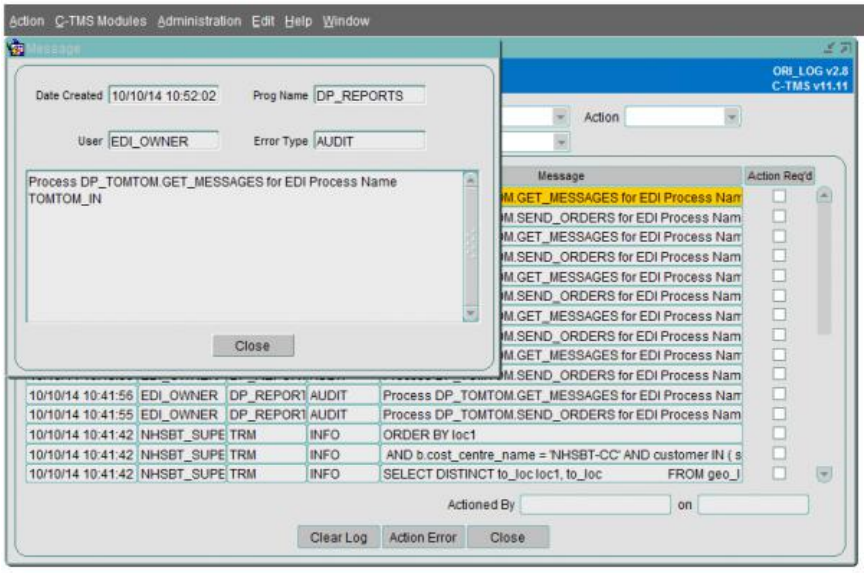


4.2 View Message

The message field can be scrolled to the right to view any more descriptive messages. In this case you can right click on the message and a new button **View Message** is shown as below.

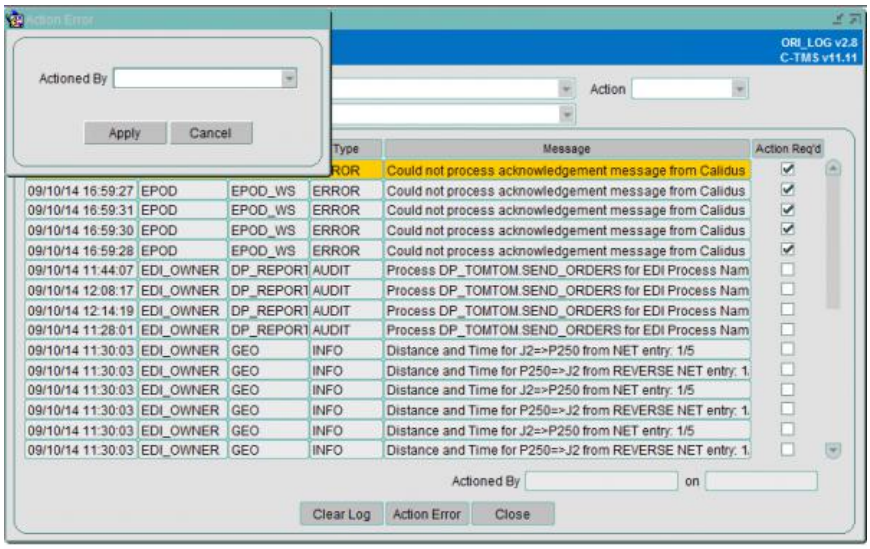


By clicking on the **View Message** button the whole message can be viewed as shown:

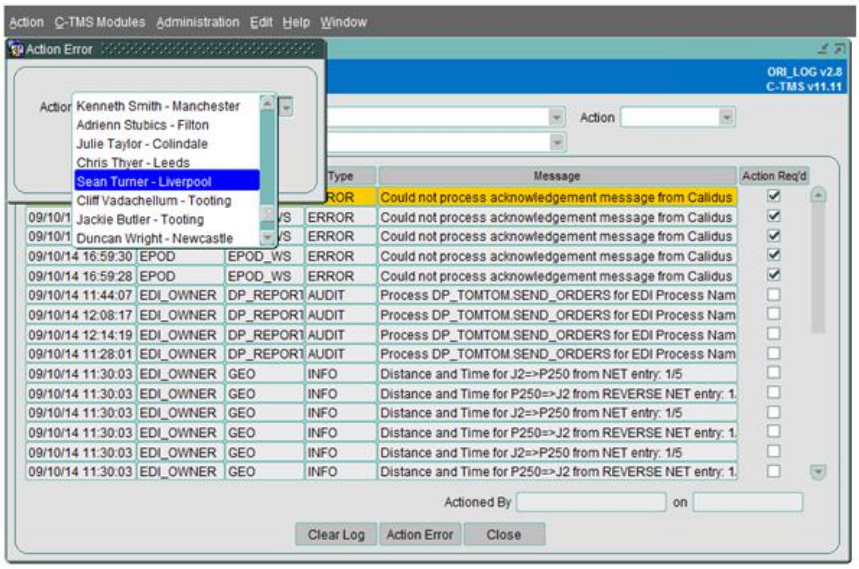


4.3 Action a Log message

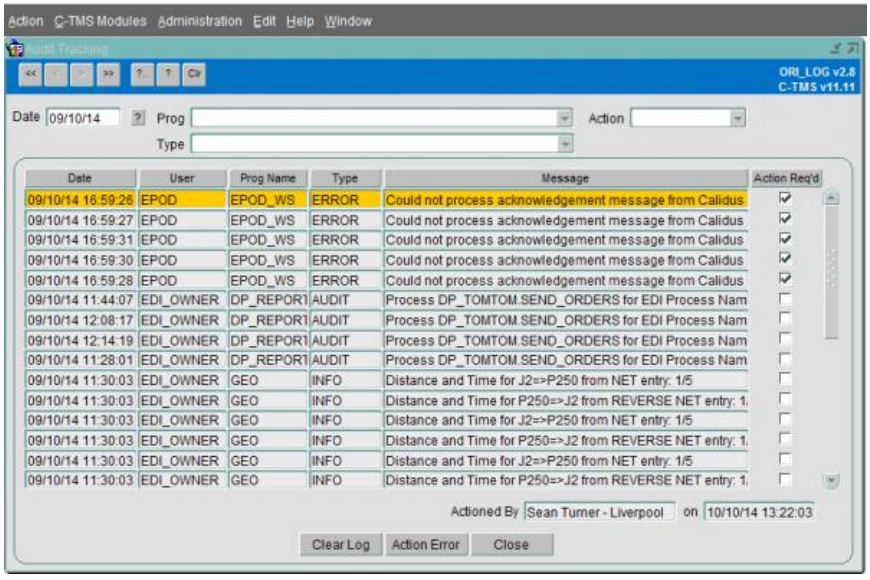
A log message can be marked to indicate that a remedial action was taken. This is indicated by the *Action Required* checkbox being ticked. To record that you have rectified the error you click the **Action Error** button and a pop-up box appears as below:



Choose the person who has actioned the error from the drop down list and press the **Apply** button.



The record is updated and the actioned by fields on the bottom right of the screen are updated:



To clear down the audit log records press the **Clear Log** button.

4.4 Further Configuration

The following are system parameters affecting this function:

Parameter	Description	Level
ADM_EXCLUDE_AUDIT_LOG	Processes that will be excluded from writing audit log records.	SYSTEM
ADM_EXCLUDE_PACKAGE_MSG	Packages whose adm log messages are not to be written	SYSTEM
ADM_LOG_ARC_DEL_DAYS	Number of days that ADM_LOG_ARCHIVE messages should be kept for	SYSTEM

5 User Maintenance

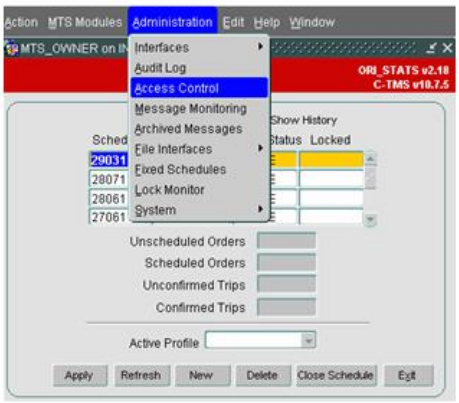
This screen allows an Administrator to create a Menu structure at a Group Level. This allows a user to be associated to a group, which will give them enough visibility (screens, tabs) for them to perform their daily duties. Other functions can also be performed using this screen such as:-

- Creating New Users.
- Creating multiple profiles for a user.
- Creating and amending new Groups.
- Editing User Profiles.
- Changing the passwords of Users.

All these options will be explained in more detail below.

5.1 Accessing the Screen

To gain access to the screen you must be an Administrator. A Standard user will not have visible of this menu option. It can be found by selecting the 'Administration' option followed by 'Access Control'.

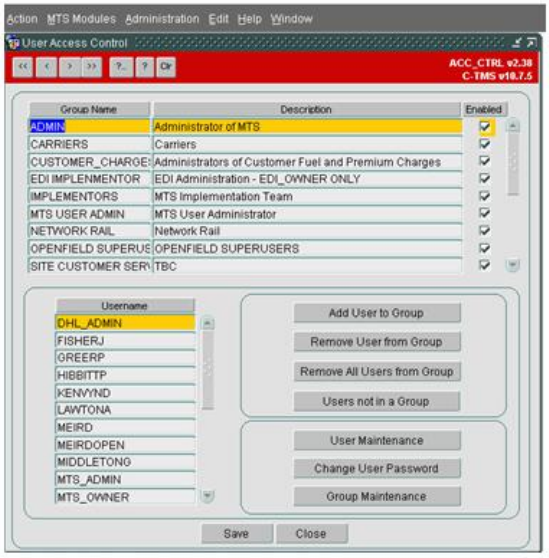


5.2 Access Control Main screen

This screen is view only and shows the existing User Groups and Users. Users can be associated to more than one group.

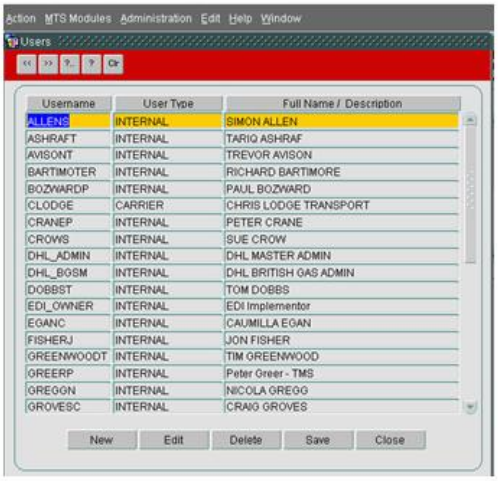
To view the Users for each group, the relevant Group Line should be highlighted.

There are a series of buttons to allow the user to Drill down further to add or edit data, expanded below.



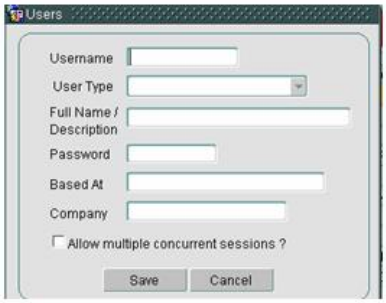
5.3 User Maintenance

Administrators are given the ability to create users and administer user passwords. When setting up a new user, the Username, User Type, Description and Password are required. Once a user has been created, there are a number of mandatory User Parameters which are also created and cannot be deleted.



5.3.1 Creating a New User

- Click the **New** Button. The user is then populated with the screen below:

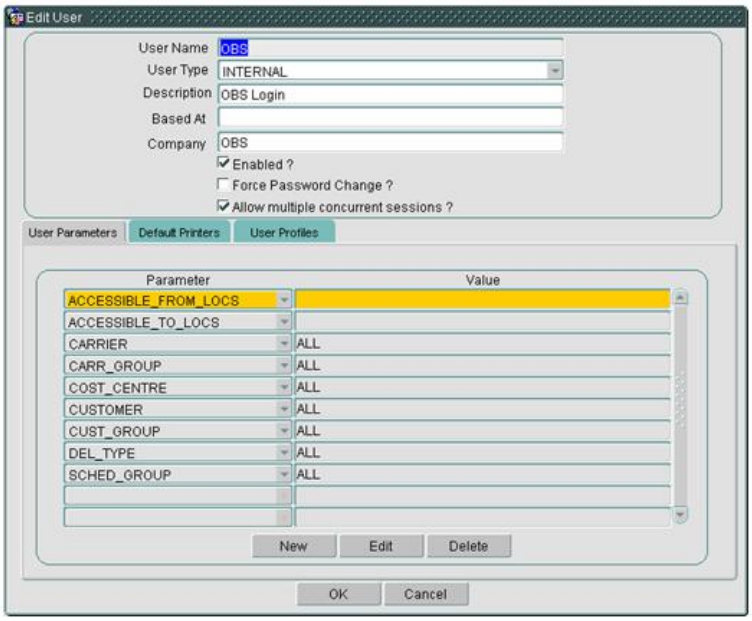


- Fill in the details on the Users screen, User Type being Internal and Based at starting with country of Residence e.g. UK.
- Click **Save**.

- The check box 'Allow Multiple concurrent sessions' allows a user to have several sessions to be opened without a warning being populated.

5.3.2 Editing a New User

Within the 'Edit' function, the Administrator can temporarily disable a user's account or can force a user to change their password. A number of parameters allow multiple selections, i.e., take for example the Carrier user parameter, a user may only be able access one carrier, another user may be able access two carriers. This can be set up quite simply in this form.



5.3.3 Change User Password

The Administrator can change the password of any user - this may be because the user has forgotten it.

5.3.4 User Parameters

By selecting the 'User Parameters' tab, the Administrator can limit the amount of data that is displayed to the user, for example, if a particular user should only see data belonging to a particular Cost Centre, then a user parameter can be added with a value selected from a list where appropriate.

A number of parameters allow multiple selections, i.e. take for example the Carrier user parameter, A user may only be able access one carrier, another user may be able access two carriers. This can be set up quite simply in this form. More details and a list of user parameters are referenced in the User Parameters section.

Note: For new users, you should:

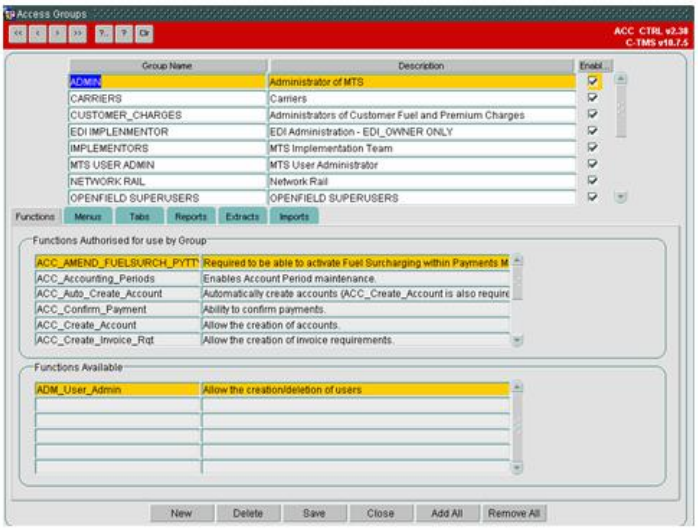
- Click **Edit** for the user you have just created.
- Edit users BASED_AT, COST_CENTER, ENTRY_FORM and SCHED_GROUP and click **OK**.

5.3.5 Default Printers

On selecting the 'Default Printers' tab an individual user can be allocated a default printer.

5.4 Group Maintenance

In order to determine which functions a group of users can perform the Administrator must identify the C-TMS business functions required. Once the menu structure has been identified, the Functions, Menus, Tabs, Reports, Extracts and Imports will need to be allocated in order to restrict/expand a user's group access to part or all functionality contained within.



5.4.1 Creating a New Group

- Click Group Maintenance then click **New**.
- Give the Group a Name and Description and check Enabled.
- For each tab add or remove processes using the **Add All/Remove All** buttons or double clicking a process to add one at a time.
- Click **Save**.

5.4.2 Editing a Group

- For the ADMIN Group in the Menus tab uncheck 'In Menu?' for Interface Errors and then click **Save**.
- Exit Form and Look for this at Administration > Interfaces.
- Will not be available.
- Put the Menu back where it was and click **Save**.
- Check Administration > Interfaces to see it is back.

5.4.3 Group Maintenance - Accessible Functionality

The screen has a series of tabs that allows the administrator to modify the features that the users in this group can access.

- Functions - functionality within screens that is accessible to the users in the group.
- Menus - menu items that are accessible to the users in this group.
- Tabs - tabs within screens that are accessible to the users in this group.
- Reports - Reports that are accessible to the users in this group.
- Extracts - Extracts that are accessible to the users in this group.
- Imports - Imports that are accessible to the users in this group.

Lists of all available tabs and functions can be found in Access Control - Accessible Functionality.

A list of all the accessible menus can be found in C-TMS Menu Hierarchy.

The Imports are variable data that is maintained in Imports maintenance.

Available Extracts and Reports are covered in their respective sections.

Each screen works similarly:

- A top panel shows the functionality that is accessible to the users in the group.
- A bottom panel shows the functionality that is currently not accessible to the users in the group.

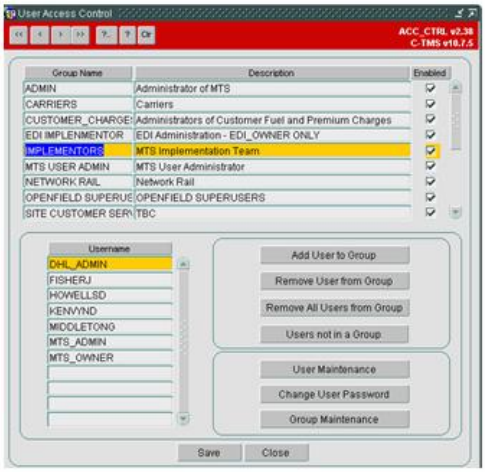
To make functionality accessible, double-click the item in the bottom panel and it will be added to the top panel.

To make functionality inaccessible, double-click the item in the top panel and it will be removed and shown in the bottom panel.

Example - tabs:

This tab allows the administrator the ability to control which tabs a group has access to. For example, the 'Bookings' group has access to the Trip Manipulation form, but they do not necessarily need to see anything to do with finance. Therefore, the administrator can restrict access to the Finance tab to the Bookings group. All forms which have tabs can be controlled in this way, except the Access Control form, which assumes that the administrator has access to ALL the tabs.

5.5 Users and Groups

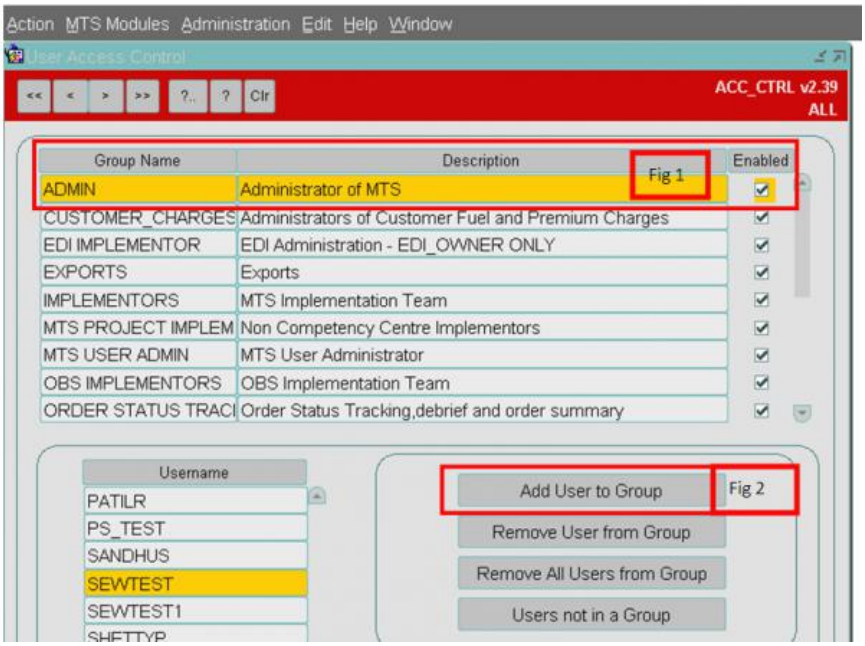


5.5.1 Adding a User to Group

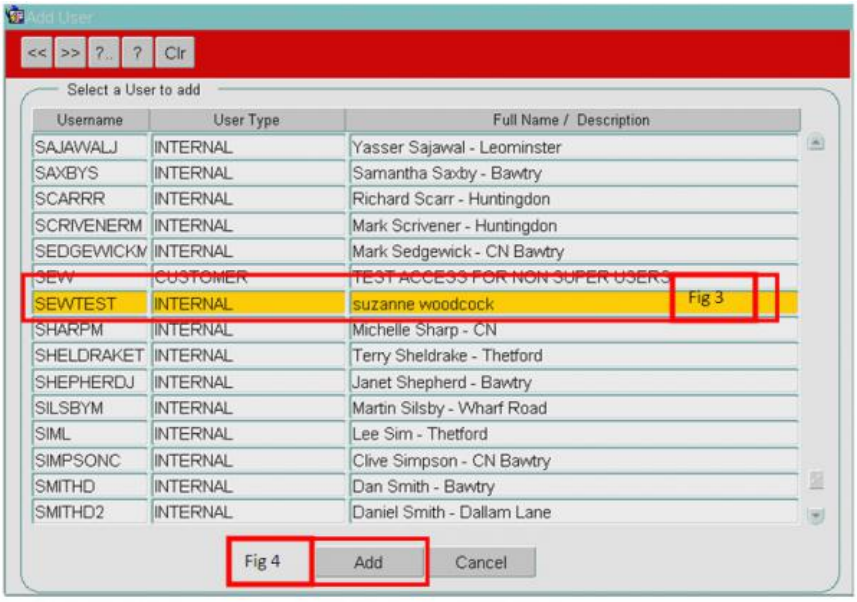
Any number of users can be added to a group, this is done by highlighting the appropriate group and pressing **Add User to Group**. A list of users not already in the group will be displayed; it is then a matter of selecting the username.

To add a user to a group take the following steps:

- Highlight the required Group that you want the user to be added to.
- Click the **Add User to a Group** button. A new form will be displayed.



- Highlight the required user to be added.
- Click the **Add** button.

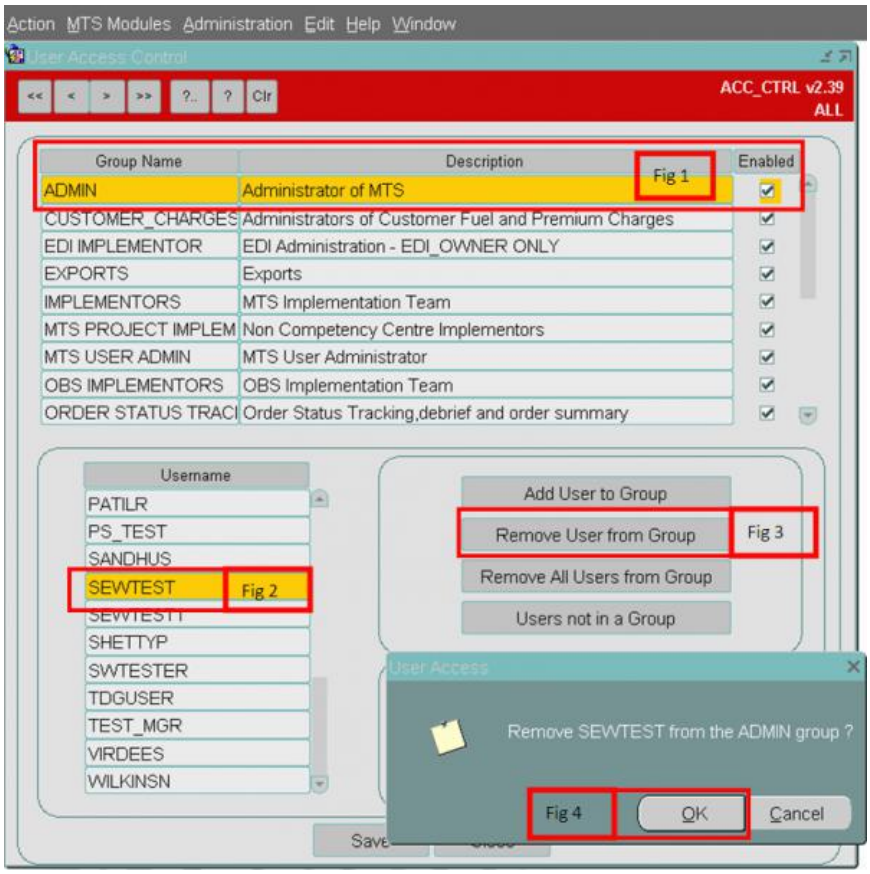


5.5.2 Remove User from Group

Users can be removed from a group at any time just by highlighting the User and clicking the button.

To Remove a User from a group take the following steps:

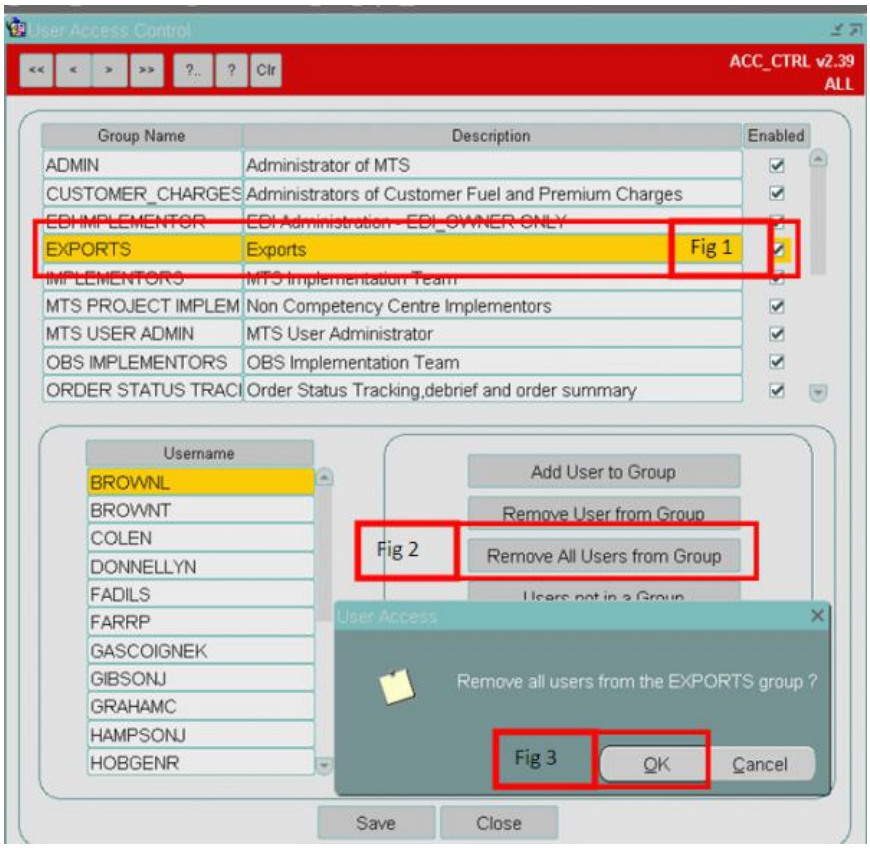
- Highlight the required Group.
- Highlight the required User.
- Click the **Remove user from Group** button.
- A pop up screen will be displayed asking the user to clarify the removal of the user from the group. Click the **OK** button to remove the user.



5.5.3 Remove All Users from Group

This button will remove all the users from a group in one action.

- Highlight the required Group.
- Click the **Remove All Users from Group** button. This will open a box.
- Click **OK** to proceed and remove all the users.



5.5.4 Users not in a Group

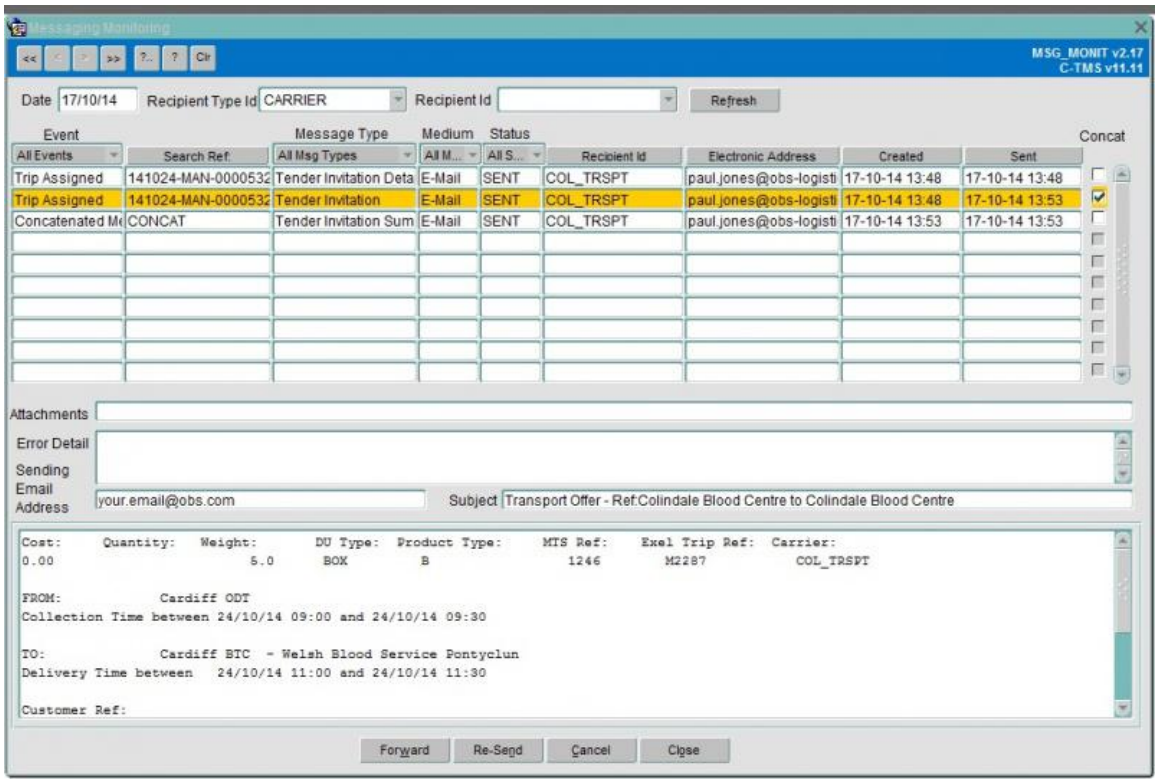
A list of users who do not belong to any group can be viewed.

6 Message Monitoring

6.1 Message Monitoring Form

The message monitoring form allows a user to choose a date and view all the messages that have been created on that day. The user can filter the messages using one or many of the following filters; the event that created the messages, the message type, the medium by which it is being distributed, the status of the message and if required the user can also search for the event reference of the message. The user is then also able to sort the results by created time, sent time, address value and subject.

An archive version of this form has also been created which will allow users to view archived messages.

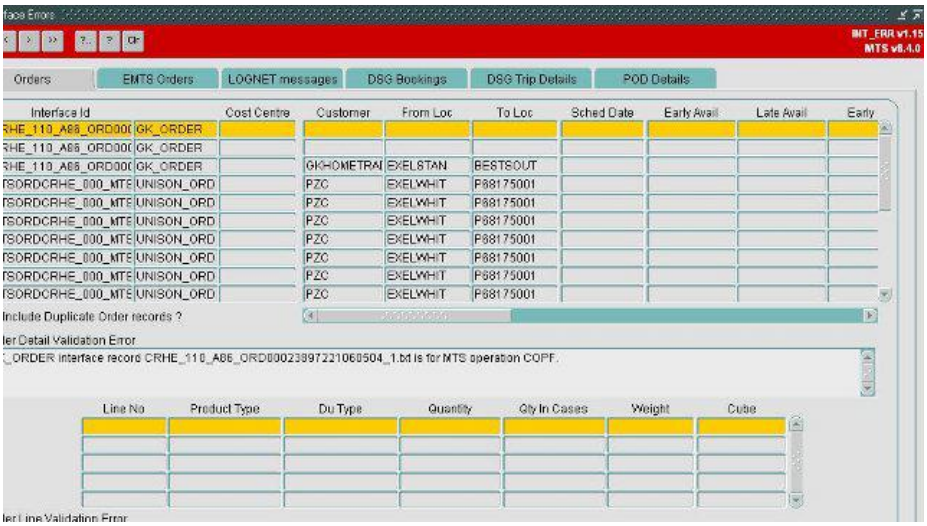


7 Orders Interface

Warning: This is an incomplete guide.

An FTP process has been created to transfer Order information from a source system into C-TMS. The orders arrive in CSV files and are processed into C-TMS with errors being reported to a new C-TMS screen for manual administration by the users.

Interface Errors screen (a new tab will be added for each new interface).



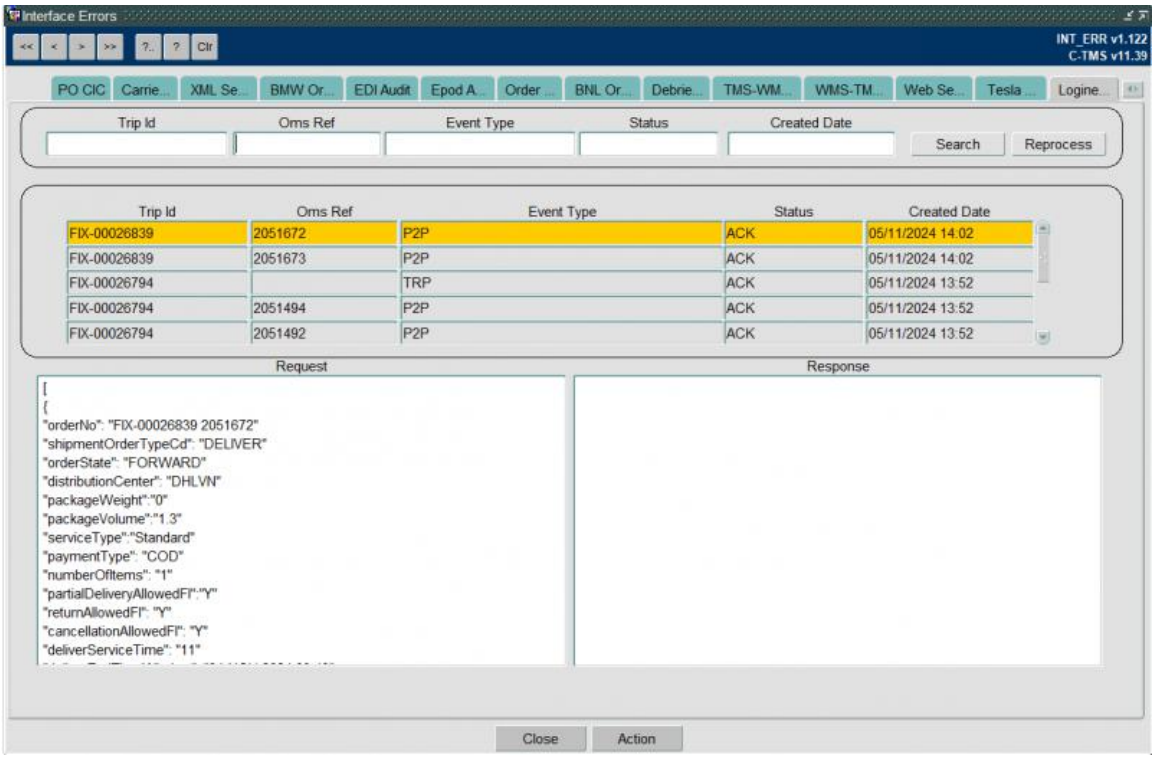
The Interfacing team should provide the interface data, extracting the necessary order data from the source system, constructing it into a CSV format consisting of a record header, order header and order detail or details lines and forward it to C-TMS where its arrival triggers an upload process. Each file contains exactly one order and is validated for structure on arrival to the server before invoking the appropriate C-TMS operation (DB) to process it.

The interface is designed to be generic. C-TMS reads the header to determine the interface type before channelling it for processing. The CSV format is extracted into interface order header and interface order details tables. Errors during this upload halt processing and result in the error being written to the tables for viewing in the C-TMS Interface Errors screen. If successfully extracted, the order is validated for loading into the C-TMS orders tables. Errors are written to the interface table for viewing and the order is rolled back. Successes are committed to the orders tables and are available for normal C-TMS orders / trip processing etc.

The FTP interface is one way (from an external source to C-TMS). Errors displayed on the error screen are administered manually via contact between C-TMS and external systems and will either result in data changes or a resend of a corrected FTP file. The FTP file name is used as the interface identifier (int_record_id) enabling order records, interface table records and files to be traced back to their origins.

7.1 LogiNext Details

This tab shows the interface messages and details of any messages to LogiNext systems.



The screen will display the details of all records from the new LogiNext audit detail described above.

You can filter the search using the search criteria in the top of the tab page and clicking **Search**.

You can reprocess the currently highlighted record by pressing the **Reprocess** button, this will then invoke the reprocessing function

Only failed outbound messages will be available to be reprocessed and an error will be shown if any other type of record is selected for reprocessing.

Note: You will not be able to edit data in this screen any errors with trips should be rectified in the planning screen.

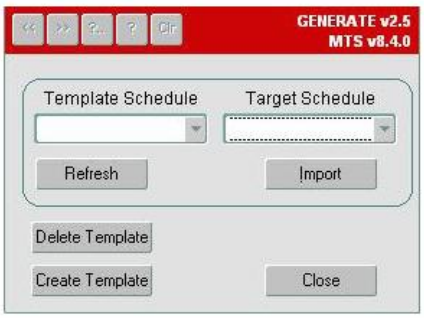
8 Fixed Templates

Fixed Templates provides functionality to copy an entire Schedule of Trips, Orders and their associated Haulage Activities for a specific Depot in to a named Template. The Template can then be generated into another Schedule to effectively copy a Depot based Schedule from one Schedule Date to another.

Fixed Schedules allow users to create a template based on orders and trips which can be used to generate future schedules. The template will generate new orders and plan them on the new trips, eliminating the need to create orders or perform planning.

The Fixed Schedule screen is accessed from the Administration menu in C-TMS.

Selecting the menu item will display the following screen. Within the screen, users may create templates and generate schedules from the templates. There is a list of available templates and a list of target schedules.

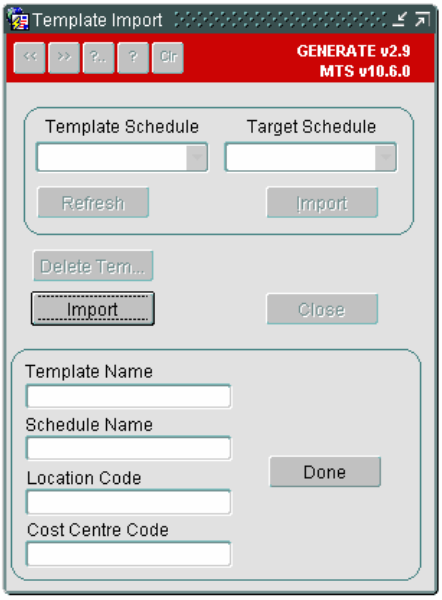


The target schedule will be required to be created, so that it is available to select from the drop down menu

8.1 CREATE TEMPLATE

Allows you to specify a Schedule of Trips, Orders and the Haulage Activities that associate the Loading and Unloading of Orders on Trip Stops for a user specified Depot to be copied into a Fixed Template. The Fixed Template can be named with an appropriately descriptive name such as TUE_SWI_NP for a typical Tuesday Non-Perishable Schedule for the Swindon Depot. This function effectively takes snapshot of a Depot Schedule so that it can be reused on an alternative Schedule in the future.

Selecting Create Template displays the following screen.



You will specify a name for the template, this should be named so it is easily identified in the drop down list. A suggested naming convention would be "MON-SUMMER", "MON-WINTER","TUES-SUMMER" etc.

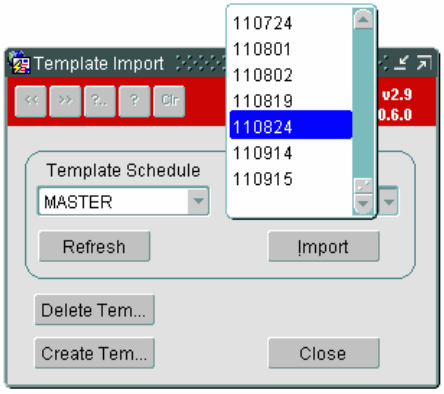
You will then specify the source schedule to be copied for the template. Where there are orders and trips for more than one cost centre or location, you may specify to base the template on orders for a specific location or cost centre.

Once the data is populated, select **Import** to create the template.

When the import is complete, the system will confirm the number of orders and trips created for the template. Select **OK** to confirm the creation of the template.

8.2 IMPORT SCHEDULE

This provides the facility to generate a new Schedule of Trip, Order and Haulage Activities for a specific Depot from a previously created Fixed Template. A stored fixed Template can be selected along with a target Schedule date and then the Template generated into the target Schedule creating all the Trips, Orders and associated Haulage Activities that were stored in the Fixed Template.



This functionality is typically used to generate Depot Schedules for particular days of the week where the deliveries made on the day do not vary greatly from week to week.

You first select a schedule you wish to copy, all orders and trips on the schedule will be copied. Any unscheduled orders on the schedule will also be copied.

The schedule will include orders being collected today for delivery tomorrow and orders which were collected yesterday for delivery today. The schedule will be based on a day of the week - eg MONDAY and will show the orders collected on a Monday and the orders delivered on a Monday.

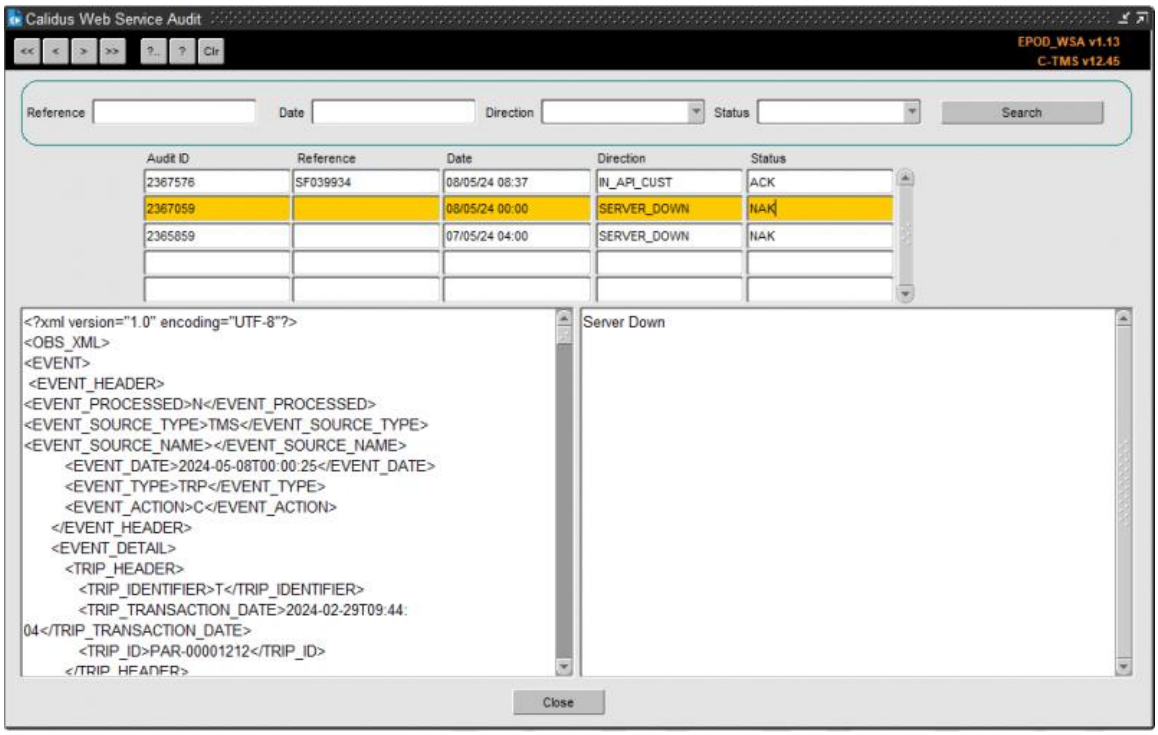
8.3 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
FIX_NULL_BOOKING_REF	Set booking Ref to Null for fixed schedules	COST_CENTRE
ORD_FIXED_SCHEDULE_CHECK	Check for existing fixed schedule generated orders	CUSTOMER
SCH_DEFAULT_FIXED_TEMPLATE	Default Fixed Template Name for Auto Generation	SYSTEM
TRM_FIXED_TRIP_STATUS	Determines status of trips created via Fixed Schedules. P for PLANNED or A for ACCEPTED.	SYSTEM

9 Calidus Web Service Audit

The Calidus Web Service Audit screen is used to check the status of messages sent through web service APIs to and from CTMS, and see the messages and status.



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You can filter the messages by the following:

- Reference
- Date
- Direction - the type of API. There are many - see below.
- Status - one of the following:
    - ACK - acknowledged - no issues.
    - NAK - not acknowledged - no process has taken place.
    - WAK - acknowledged with a warning. Some processing has taken place. See the response for details.

Direction indicates the type of interface through the webservice, into or out of CTMS, and the method. Select from one of the following, or leave blank:

- Inbound - Load and Job messages from C-ePOD to CTMS.
- Outbound - Load and Job messages from CTMS to C-ePOD.
- Inbound Trip
- Driver - Driver updates from CTMS to C-ePOD.
- Vehicle - Vehicle updates from CTMS to C-ePOD.
- Reason - Reason code updates from CTMS to C-ePOD.
- Web Service Orders
- Outbound API - TripOrder messages from C-TMS outbound.
- Carrier API
- Vehicle Search - Query from C-ePOD to CTMS for customer vehicle details.
- Job Swap - Job Swap messages from C-ePOD to CTMS.
- Order Enquiry
- Inbound API Order - TripOrder messages inbound to CTMS to create orders.
- Inbound API Customer - inbound customer onboarding messages to CTMS to create customers and customer-owned locations.
- Vehicle Position Request - request for C-ePOD vehicle position.
- Paragon API - Paragon API requests.

Depending on your configuration, one or many of these interfaces may be of paramount importance to view, to potentially deal with any issues.

You should select the criteria that matches the interface you want to investigate or see.

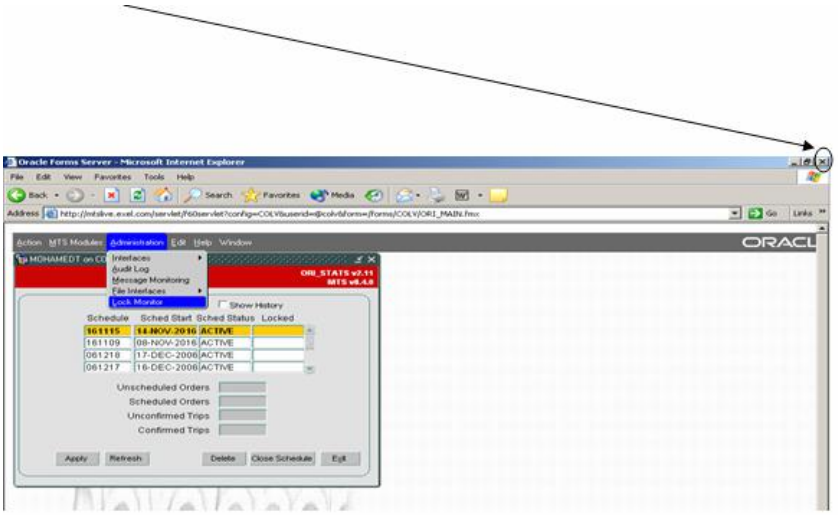
When you click the **Search** button, the results are displayed in the table below.

When you click on a message, you can see the request (the data sent) and the response from the server.

10 Lock Monitor

Lock Monitor functionality in C-TMS allows users with appropriate authority to view and monitor user sessions that are locking a particular transaction. It is possible to close sessions that have been locked.

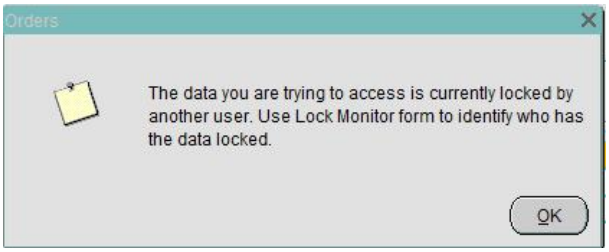
One simple example where the system could lock a transaction is that when in midst of changing the details of a Order/Trip the users closes the session with C-TMS by using the ?x? button of the windows explorer and not properly ?Exiting? the C-TMS system.



Lock Monitor form can be accessed from the Administration Menu.

10.1 Record Lock

The system can legitimately notify where a user is attempting to view or change data where another user is currently in the process of editing the same record related to a specific order or trip. The user is advised to use the Lock Monitor form in order to enquire why the data is locked.



In this instance the form should be used for enquiry in order to ascertain whether it is genuine user activity or if it is a data lock from a redundant session - in the majority of cases the user should be advised to Save their data which will release the lock.

Note: C-TMS server automatic administration routines run to check where a redundant session lock may have been left and will automatically remove this.

10.2 The Lock Monitor Form

The lock Monitor is a high level super user screen which allows you to see any data tables for which there may be one or more locked records. You can also see all current user sessions and any user sessions that may be blocked by another user.

There are multiple tabs.

10.2.1 Locks

This tab indicates any current data tables that have one or more records locked by a user. This will show ALL transactions and so the majority of which will be perfectly normal transactions updating data.

Lock Monitor allows users with appropriate authority to view and monitor user sessions that are locking a particular transaction. It is possible to close sessions that have been locked.

By using the **Kill Session** button, you will be able to close the session of a particular user. All unsaved information will be lost and the user will show an error message and will have to log into C-TMS again.

As this is powerful functionality, the access to this form will be restricted to a select few users.

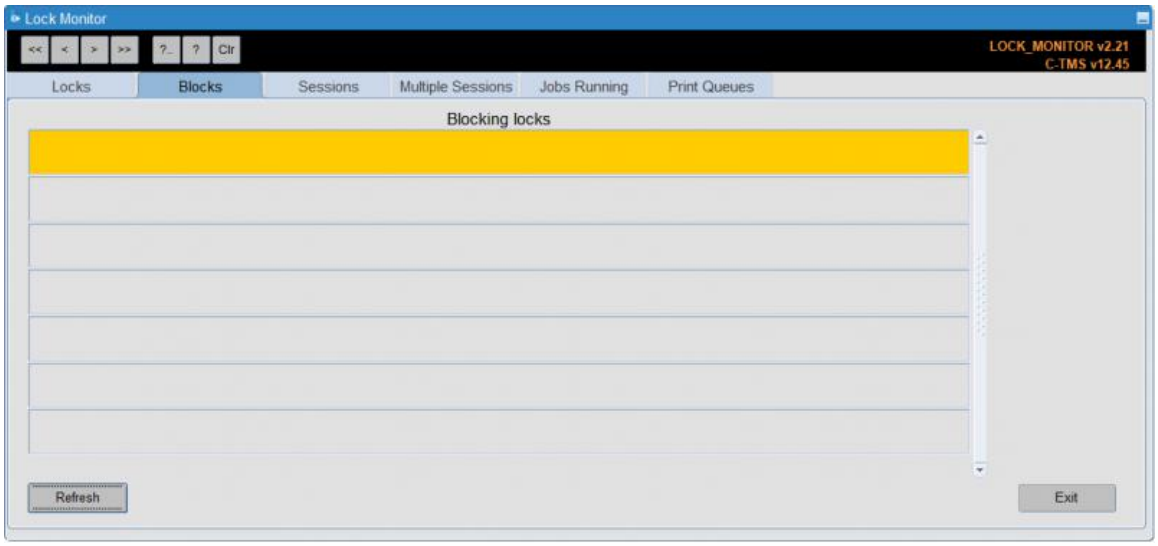
To test this on a test system Edit a Trip in the Trip Manipulation screen then Open Lock Monitor, you will see that you have particular tables locked relating to the trip you are editing. Now open two C-TMS sessions with different user ID's and use both to access the same trip in Trip Manipulation. One user will be informed that the other user has the trip locked. **(Do not try this in a production environment! Make sure you are logged into a test system first.)**

10.2.2 Blocks

This tab highlights any users that may currently be blocked by another user process and indicates which data table the blocked user is trying to update. This is predominately caused when two or more users are attempting to update the same data record.

Blocking happens when one connection from an application holds a lock and a second connection requires a conflicting lock type. This forces the second connection to wait, blocked on the first. One connection can block another connection, regardless of whether they emanate from the same application or separate applications on different client computers.

When data is seen within this tab the user can kill the session(s) by clicking on the **Kill Session** button from within the Locks Tab.



10.2.3 Sessions

This tab highlights any current users sessions that are connected to the C-TMS application.

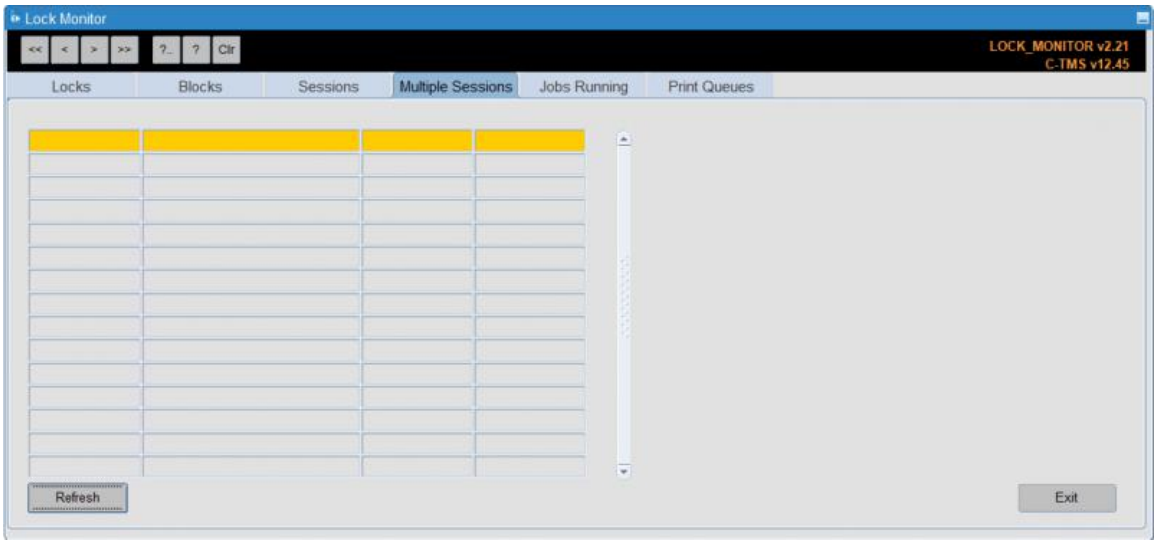
This tab shows all sessions that a User currently has open. Note that C-TMS is a Modal database, which means the user can open up multiple forms at the same time. Each time the user opens up a form on top of another one another session will be created.

Please note that you will also see sessions in here if a developer or Administrator is accessing the system via the SQL server.

An indication of the initial logon time and when the last activity was conducted is also shown. Most of these will be genuine sessions and are perfectly normal.

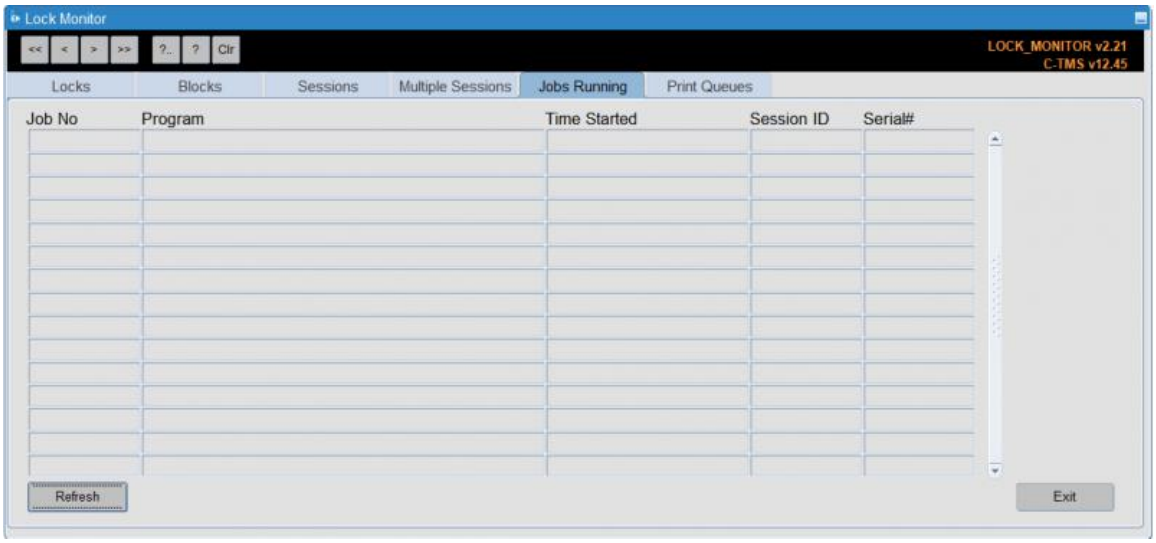
10.2.4 Multiple Sessions

This tab shows all users with multiple sessions open.



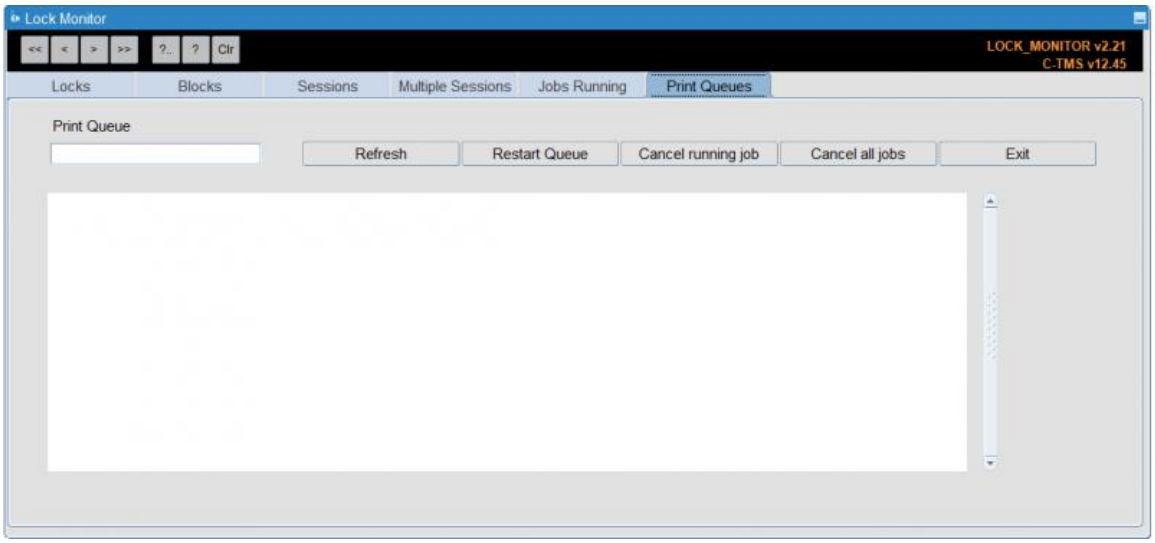
10.2.5 Jobs Running

This tab shows all running jobs in the system.



10.2.6 Print Queues

This tab shows all print queues.

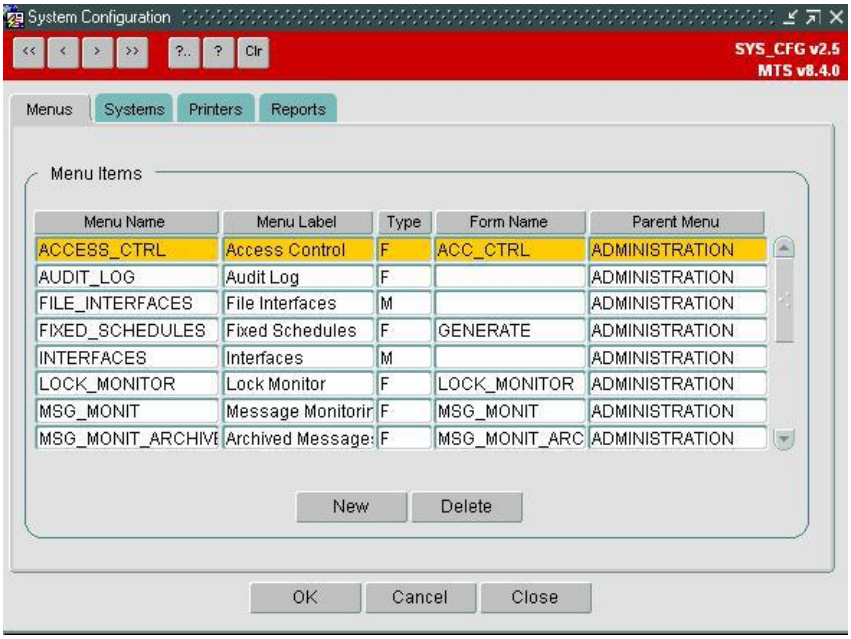


You can find print queues through the Print Queue field - a lookup is provided. You can bring up details of the print queue with the **Refresh** button.

You can restart the queue, cancel the running job or cancel all jobs with the provided buttons.

11 System Configuration

This form allows the configuation of menus, external systems, default printers, and reports.



11.1 Menu Items

Configuration of menu items is controlled using the screen below. The System Configuration -> Menus tab allows administrators to control how the C-TMS menu is constructed, the labels that are displayed and the forms that are called.

11.2 Systems

In order to define source systems within C-TMS the tab below is used. A source system is an application or method by which orders are created and fed into C-TMS. For example LANES, these are orders entered via the Lane Based Order Entry form.

11.3 Printers

Printers used centrally and on remote sites are defined here. Printer queues are set up when C-TMS is accessed using the Oracle Application Server. The queue name is the report queue that is defined when the Oracle Reports server is set up.

11.4 Reports

Report configuration allows administrators to include and set up reports that are to be used in C-TMS. The report name is the name that will appear in the reports drop down list on the reports form. The settings Filename, Printer Type and Orientation are self explanatory, the Default Queue is the queue that the report will be sent to when using Oracle Reports Server.

12 System Parameters

System Parameters are used throughout C-TMS Host to store values that may change over time or vary between Operations.

System Parameters are used to control functionality, by switching functionality on or off, or storing values for functionality to use.

Parameters may be defined as system wide, by cost centre or customer. System wide parameters control functionality across the whole system. Trips and Orders are assigned a cost centre, and this can be used to determine which functionality is applied to an order or trip.

They can be of 2 types:

- those that users are permitted to edit such as MAX_SHIFT_HOURS, SCH_SCHED_START and SLOT_DFLT_TRAILER_TYPE. This is the top table of the screen.
- those parameters that cannot be modified by users such as FORMS_WEB_PATH and MTS_CSV_EXPORT_PATH. This is the bottom table of the screen.

Many of the parameters refer to filenames or directory names that configure the environment, these will vary between environments but it would not be advisable for a user to be able to change them.

System parameters will be added initially by the Development Team and can then be viewed or modified as appropriate using the following form:

The screen is split into 2 separate data blocks. The parameters displayed in the top block may be amended manually by a user. The parameters in the bottom block may not be amended by the user.

12.1 Configuring Parameters

To edit a parameter in the top block highlight the parameter and overwrite the information in the Value field.

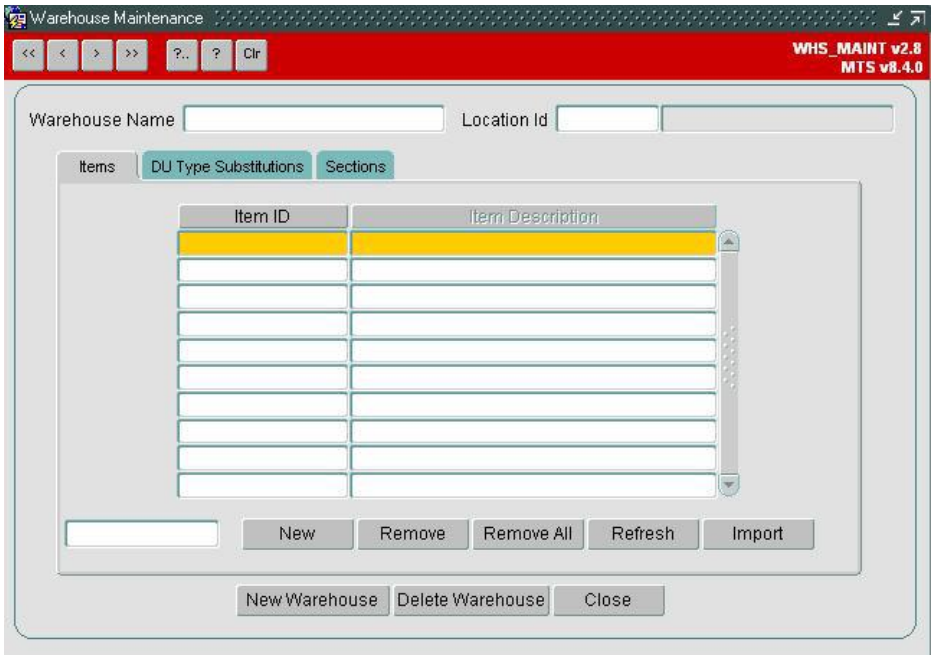
To configure a non-system configurable parameter:

- Click the parameter.
- Click **Configure**
  - ♦ The system will display a pop-up, showing you the parameter and the description.
- Enter the following details:
  - ♦ Config By - a drop-down list of the configurable levels.
  - ♦ Config By Value - the value relating the the configuration level above. A lookup is provided.
  - ♦ Config Value - the configurable value. Use the description to gather which are appropriate values to each rule.

There are hundreds of system and user configurable parameters, and these are added to all the time. The list of parameters you configure is in the the screen - it is a self-documenting system. For reference, a list exists in System Parameters List.

13 Warehouse

The C-TMS Host Warehouse functionality provides the opportunity to map particular Product Items to alternative DU Types to those that would usually be assigned in the Bookings Auto Summary process. The functionality exists to cater for the situation where a single depot is made up of multiple warehouses. Each warehouse will distribute particular Product Items. During the Auto Summary process each Product Item is checked to see if it is distributed from a warehouse within a depot location. If so, the user defined DU Type is substituted in place of the usual DU Type. The result would typically be two Product Summary records with the only difference being DU Type. This DU Type is then used as an indicator to which warehouse will distribute the goods.



13.1 Key Functionality

13.1.1 Depot Warehouse Configuration

Warehouses can be manually configured at a Depot location. Each Warehouse is assigned a name and the owning location.

13.1.2 Product Item Warehouse Allocation

Product Items are configured as belonging to a Depot Warehouse. These Product Items are then mapped onto alternative DU Types if their DU Type is configured as a Substitution DU Type.

13.1.3 DU Substitution Mapping

The usual DU Type for a Depot or Depot/Store combination can be mapped to the substituted DU Type. For example, a Standard Roll Pallet could be mapped to a Large Board.

Once this mapping data is configured the process can successfully substitute DU Types. For example, a Product Item with an item code of 111122223333 may be configured at a warehouse named ?LEICESTER REMOTE? at the Depot ?LEICESTER?. The usual DU Type for this Product Item from this Depot may be a Standard Roll Pallet which in this case would be mapped to a Large Board