aptean

Marshalls

EPOD Admin Jobs and Load Search Changes

Functional Specification

12th February 2019 - 2.0
Reference: FS 355164

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1 Appendix A: TEST PLAN

Test Script / Scenario Reference	*Addition Premier Data Import*	**Call Number(s): 343365 SCR-339876-01**
Test Script / Scenario Description	*Testing the new data requirements for Premier Mortars are met.*	**PASS / ISSUES / FAIL**
Menu Access	*Administration/Auto-Import*	
Pre-requisites	*A system configured as Marshalls.*	**Tested By:**
Test Objective	*To test: Auto-Import may import the new data through the XML format; webservice import may import the new data and; Admin displays and can maintain the new fields.*	**Date:**

Step	Action	Result	Remarks	P/F
1	**Import**			
	Create a test XML file that contains all the new fields, compliant with the new XSD. Also create a file without all these field fields, for limit testing.			
1.01	Configure a file Auto-Import for Loads. Drop the file without the new fields into the specified directory and check the import log and jobs.	Loads, Jobs and Products created with no issues, but without the new data.		
1.02	Drop the file with the new fields into the specified directory and check the import log and jobs.	Loads, Jobs and Products created with no issues, with the new data populated as expected.		
1.03	Paste the contents of the file without the new fields into the webservice through a browser and check the import log and jobs.	Loads, Jobs and Products created with no issues, but without the new data.		
1.04	Paste the contents of the file with the new fields into the webservice through a browser and check the import log and jobs.	Loads, Jobs and Products created with no issues, with the new data populated as expected.		

Step	Action	Result	Remarks	P/F
2	**Admin System**			
	Ensure there are some jobs and products with the new data already added, as well as some jobs and products without the new data.			
2.01				

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	In the jobs screen, add a new job, enter the new fields and save. Check the job.	The new fields are entered as expected, with validation as described. The data is saved, and redisplayed when the details are shown again.		
2.02	In the jobs screen, find a job without any of the new data. Add the data, save and modify again.	The new fields are entered as expected, with validation as described. The data is saved, and redisplayed when the details are shown again.		
2.03	In the Containers/Products screen, add a product (loose and within a container), enter the new fields and save. Check the product.	The new fields are entered as expected, with validation as described. The data is saved, and redisplayed when the details are shown again.		
2.04	In the Containers/Products screen, find a product without the new data (loose and within a container). Add the data, save and modify again.	The new fields are entered as expected, with validation as described. The data is saved, and redisplayed when the details are shown again.		

Step	Action	Result	Remarks	P/F
3	**Mobile Device**			
	Ensure there are some jobs and products with the new Position data. A style adding this Position field should be created.			
3.01	Log-in, download the load, start the job with the new Position (hopper) data and view the Products list.	The hopper should be displayed.		
3.02	Select a product on this job and choose Product Info.	The hopper should be displayed.		
3.03	Start a job without Hopper information. View the products list.	The hopper label will be displayed, but with no data.		
3.04	Select a product and choose Product Info.	The hopper will not be displayed.		

2 Appendix B: Quote & Document References

Cost Details				
Activity	**Estimate No. of Days**	**No. of Days**	**Rate per Day (?)**	**Cost (? Exc. VAT)**
Requirements	0.00	0.00	750	?0.00
Change Request Evaluation	0.00	0.00	750	?0.00
Functional Specification	0.75	1.00	750	?750.00
Technical Specification	0.00	0.00	750	?0.00
Development	3.50	4.50	750	?3,375.00
Testing and Release	0.25	0.50	750	?375.00
Implementation	0.25	0.25	750	?187.50
Project Management	0.25	0.25	750	?187.50
TOTAL	5.00	6.50		?4,875.00

Estimate excludes training, release to live and go live support.

B.1 References

Ref No	Document Title & ID	Version	Date
1	REQ 339867 Marshalls Premier Mortars Solution Design	1.3	25/05/2017

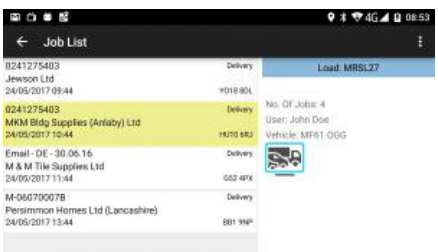
B.2 Glossary

Term	Definition
EPOD	Electronic Proof of Delivery. The OBS EPOD system is *CALIDUS* ePOD.
CALIDUS eSERV	The OBS mobile system to complete Service functionality in the field. This is part of the *CALIDUS* ePOD system.
PDA	The mobile device on which the C-ePOD system will run in the field. This can be a Phone, EDA or industrial PDA, running Android.
DAL	Data Access Layer. A mechanism for accessing data by the system that is removed from the application, allowing for simplified access and providing protection to the data, as only approved DAL methods can be used to modify it.
GPS	Global Positioning System. A mechanism of retrieving accurate positioning information in the form of Latitude and Longitude (Lat-Long) co-ordinates from a device.
GPRS, 3G, HSDPA, Data Service	All terms referring to mobile device network connectivity, and the speed at which the device connects to the internet.

B.3 Authorised By

Matt Turner	OBSL Account Manager	_____
Simon Martin	Customer Representative	_____
Debbie Linley	Customer Representative	_____

Login

- 

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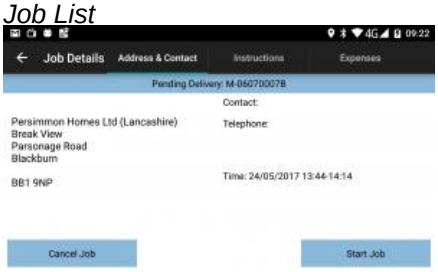
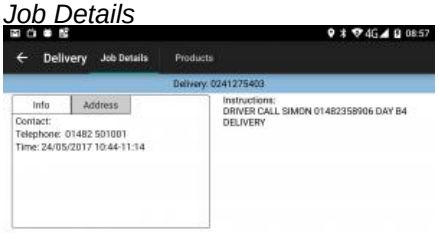
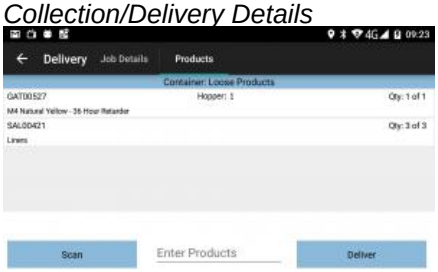
- *Job List*



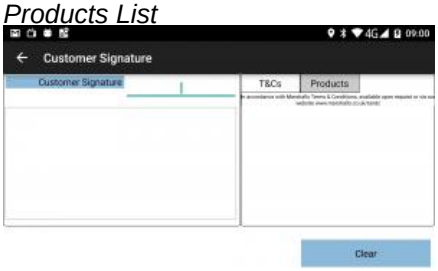
- *Job Details*



- *Collection/Delivery Details*



- *Products List*



Signature

2.1 Marshalls Landscape Style Changes

The "Marshalls Landscape" style will be created as a copy of the "Marshalls Premier Mortars" style above, called "MAR-LAND" with description "Marshalls Landscape".

The additional differences will be as follows:

The Job Details screen will have the **Cancel Job** button removed.

The following translations will be added, to ensure that the labels on the device are correct:

- The message "Start Job" will be translated to "Deliver Job".

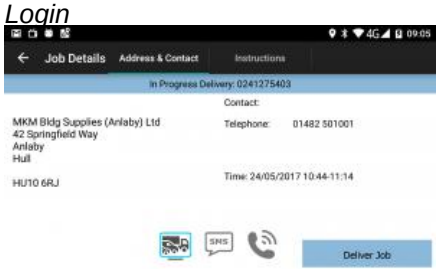
The Product List will show only the following data per item:

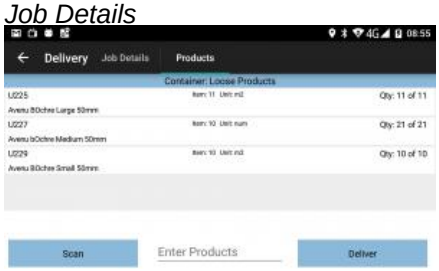
- The Product Code (EPL_PRODUCT_CODE)
- Unit Type (EPL_UNIT_TYPE)
- Pack Size (EPL_ITEM_TYPE)
- The Planned Quantity (EPL_PRODUCT_QTY_PLANNED)
- The Description (EPL_DESCRIPTION)

Note: The style has been prototyped and can be seen in the development system. This style does not include the Position field on the Product List (as this is being developed as part of other changes) and should be modified for this purpose.

Screen-shot samples:

-

Login
- 

Job Details
- 

Products List

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3 Appendix A: TEST PLAN

Test Script / Scenario Reference	*Marshalls Mobile Device Styling*	**Call Number(s): 343389 SCR-339876-03**
Test Script / Scenario Description	*Testing the new Marshalls mobile device styles*	**PASS / ISSUES / FAIL**
Menu Access	*N/A*	
Pre-requisites	*A system configured as Marshalls.*	**Tested By:**
Test Objective	*To test the two new Marshalls styles.*	**Date:**

Step	Action	Result	Remarks	P/F
1	**Mobile Device**			
	Ensure there are "Marshalls Premier Mortars" and "Marshalls Landscape"-type jobs available for execution on the device.			
1.01	Configure to the "Marshalls Premier Mortars" style. Load the mobile device app on a TomTom PRO device and complete a job.	The login screen should show the correct logo. The Job list should be configured as expected. The WEBFLEET toggle button should be on the Load Information. The "Deliver Checked" check box should not be present. The Products list should be as expected. No Signatory should be present on customer signature.		
1.02	Configure to the "Marshalls Landscape" style. Load the mobile device app on a TomTom PRO device and complete a job.	The login screen should show the correct logo. The Job list should be configured as expected. The WEBFLEET toggle button should be on the Load Information. The **Cancel Job** button should not be on the Job Details screen. The **Start Job** button should be labelled "Deliver Job". The "Deliver Checked" check box should not be present. The Products list should be as expected. No Signatory should be present on customer signature.		

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4 Appendix B: Quote & Document References

Cost Details				
Activity	**Estimate No. of Days**	**No. of Days**	**Rate per Day (?)**	**Cost (? Exc. VAT)**
Requirements	0.00	0.00	750	?0.00
Change Request Evaluation	0.00	0.00	750	?0.00
Functional Specification	0.25	0.25	750	?187.50
Technical Specification	0.00	0.00	750	?0.00
Development	1.00	1.00	750	?750.00
Testing and Release	0.25	0.25	750	?187.50
Implementation	0.25	0.25	750	?187.50
Project Management	0.25	0.25	750	?187.50
TOTAL	2.00	2.00		?1,500.00

Estimate excludes training, release to live and go live support.

B.1 References

Ref No	Document Title & ID	Version	Date
1	REQ 339867 Marshalls Premier Mortars Solution Design	1.3	25/05/2017

B.2 Glossary

Term	Definition
EPOD	Electronic Proof of Delivery. The OBS EPOD system is *CALIDUS* ePOD.
CALIDUS eSERV	The OBS mobile system to complete Service functionality in the field. This is part of the *CALIDUS* ePOD system.
PDA	The mobile device on which the C-ePOD system will run in the field. This can be a Phone, EDA or industrial PDA, running Android.
DAL	Data Access Layer. A mechanism for accessing data by the system that is removed from the application, allowing for simplified access and providing protection to the data, as only approved DAL methods can be used to modify it.
GPS	Global Positioning System. A mechanism of retrieving accurate positioning information in the form of Latitude and Longitude (Lat-Long) co-ordinates from a device.
GPRS, 3G, HSDPA, Data Service	All terms referring to mobile device network connectivity, and the speed at which the device connects to the internet.

B.3 Authorised By

Matt Turner	OBSL Account Manager	_____
Simon Martin	Customer Representative	_____
Debbie Linley	Customer Representative	_____

Prompting for Customer Signature

-

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After entry of Customer Signature

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5 Appendix A: TEST PLAN

Test Script / Scenario Reference	*Unmanned Location Signature*	**Call Number(s): 343516 SCR-339867-06**
Test Script / Scenario Description	*Testing the Unmanned Location processing*	**PASS / ISSUES / FAIL**
Menu Access	*N/A*	
Pre-requisites	*A system configured as Marshalls.*	**Tested By:**
Test Objective	*To test that: the system can be configured with this new Unmanned Location process; the driver can sign on behalf of a customer when configured for this process and; the POD does not display "No Image Found".*	**Date:**

Step	Action	Result	Remarks	P/F
1	**Admin (Configuration)**			
1.01	Test that the new configuration flag can be set, saved and shown in the Job Group screen.	The new flag can be set. The values are as expected. The default value is as expected. The label and pop-up help are present and correct. The value is displayed correctly in the screen.		

Step	Action	Result	Remarks	P/F
2	**Mobile Device**			
	Set up multiple job groups, two with Unmanned Location configured to "Driver Sign, Photo Required" and Optional Job Photo, and one as "Disabled" with Required Job Photo. Neither job group should required driver signature. Create 1 job of each job group on a load. Ensure both job groups are set to Optional			
2.01	Start a job configured with Unmanned Location. Deliver all the items.	The Signature screen is shown, showing the **Unmanned Location** button.		
2.02	Press the **Unmanned Location** button.	The alert shows as expected, asking for confirmation.		
2.03	Press **Cancel**	The user is returned to the Signature screen.		
2.04	Press the **Unmanned Location** button. Press **Confirm**.	The Driver Signature screen is shown. No "Unmanned Location" button is present.		
2.05	Back-out of the driver signature screen.	The Collection/Delivery screen is shown.		

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2.06	Press **Complete**. Press the **Unmanned Location** button. Press **Confirm**. Enter a driver signature. Press **Done**. Confirm the signature.	The Job Photo screen is shown. The **Skip** button is not present.		
2.07	Press **OK**	An error alert will be shown, that at least one photo must be taken.		
2.08	Take a photo, enter a comment and complete the job. Start the next job with Unmanned Location enabled. Complete delivery of the items. Enter a signatory.	The **Unmanned Location** button is still present.		
2.09	Enter a signature.	The **Unmanned Location** button is replaced with a **Done** button.		
2.10	Press **Clear**	The **Done** button is replaced with a **Unmanned Location** button.		
2.11	Enter a signature and press **Done**. Confirm.	The Job Photo screen is displayed. A **Skip** button is present.		
2.12	Press **Skip** and confirm.	The job is completed and the job list is shown.		
2.13	Start the job without Unmanned Location. Complete delivery of the items.	The signature screen is displayed. There is no **Unmanned Location** button.		
2.14	Enter the signatory and signature and click the **Done** button. Confirm.	The Job Photo screen is displayed. A **Skip** button is present.		
2.15	Press **Skip** and confirm.	The job is completed and the job list is shown.		

Step	Action	Result	Remarks	P/F
3	**Admin - POD Report**			
	These tests are based on the jobs completed in the previous cycle. Ensure the MPMS format is configured for each job group.			
3.01	Run the POD report for the first job completed.	There is no customer signature - this is blank. The driver signature is displayed.		
3.02	Run the POD report for the second job completed.	There is no driver signature - this is blank. The customer signature is displayed.		
3.03	Run the POD report for the third job completed.	There is no driver signature - this shows "Image Not Available". The customer signature is displayed.		

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6 Appendix B: Quote & Document References

Cost Details				
Activity	**Estimate No. of Days**	**No. of Days**	**Rate per Day (?)**	**Cost (? Exc. VAT)**
Requirements	0.00	0.00	750	?0.00
Change Request Evaluation	0.00	0.00	750	?0.00
Functional Specification	1.00	1.00	750	?750.00
Technical Specification	0.00	0.00	750	?0.00
Development	5.00	5.00	750	?3,750.00
Testing and Release	0.50	0.50	750	?375.00
Implementation	0.25	0.25	750	?187.50
Project Management	0.25	0.25	750	?187.50
TOTAL	7.00	7.00		?5,250.00

Estimate excludes training, release to live and go live support.

B.1 References

Ref No	Document Title & ID	Version	Date
1	REQ 339867 Marshalls Premier Mortars Solution Design	1.3	25/05/2017

B.2 Glossary

Term	Definition
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PDA	The mobile device on which the C-ePOD system will run in the field. This can be a Phone, EDA or industrial PDA, running Android.
DAL	Data Access Layer. A mechanism for accessing data by the system that is removed from the application, allowing for simplified access and providing protection to the data, as only approved DAL methods can be used to modify it.
GPS	Global Positioning System. A mechanism of retrieving accurate positioning information in the form of Latitude and Longitude (Lat-Long) co-ordinates from a device.
GPRS, 3G, HSDPA, Data Service	All terms referring to mobile device network connectivity, and the speed at which the device connects to the internet.

B.3 Authorised By

Matt Turner	OBSL Account Manager	_____
Simon Martin	Customer Representative	_____
Debbie Linley *Export Configuration*	Customer Representative	_____

Each site will be configured with this Export Configuration.

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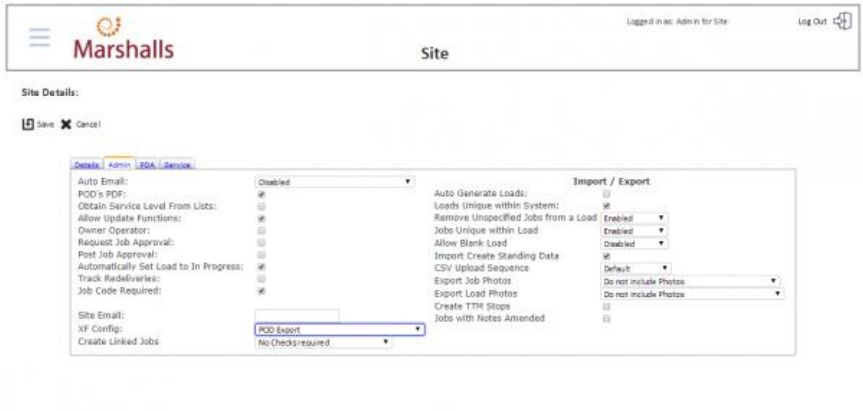
- 

Site Maintenance

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7 Functional Description

Note: The nature of this change is very technical, in that it deals with back-end processing of exports and generic production of reports. As such, it is not expected that this can be explicitly reviewed and accepted. However, the overall result of this change is as described in the Solution Overview above.

7.1 Configurable POD/POC Report

The parameter EPOD_CONFIG_REPORT.ECR_EMAIL_IMAGES_IND will change from values 0 (disabled) and 1 (enabled) to the following values:

- 0 - not created
- 1 - Created - same file
- 2 - created - split file in export

The POD section of the report will be changed to be surrounded in comments as follows:

This will be achieved method PopulateReport, when the divContent.innerHtml is populated.

The Image section of the report will be changed to be surrounded in comments as follows:

This will be achieved in method generateImageData.

7.2 AutoExport

EPOD_SYS_EXPORT.ExportPOD will be changed to the call to EPOD_SYS_EMAIL.GetReportHTML, to add a parameter by reference for the configurable report format (EPOD_CONFIG_REPORT).

EPOD_SYS_EMAIL.GetReportHTML will be changed to get the configurable report format (if this is a configurable report) and set to this parameter. A new EPOD_CONFIG_REPORT DAL object will be created, passing in the configurable report ID from the Job Group, if this is a configurable report, for POD and POC types - service reports are not affected at this time. The parameter will be set to this object created, or null.

EPOD_SYS_EMAIL.GeneratePDFFromHTML will be changed to receive a new parameter (p_strOrient) indicating (P)ortrait or (L)andscape. If present, add following to the call to WkHTMLtoPDF:

```
(p_strOrient == PDFDocument.Orientation.Portrait ? "portrait" : "landscape") + " "
```

The same change above will be added to EPOD_SYS_EMAIL.GenerateImageFromHTML

EPOD_SYS_EXPORT.EmailPOD will be changed to add an EPOD_CONFIG_REPORT parameter to call of GetReportHTML.

EPOD_SYS_EXPORT.ExportPOD will be modified to add an EPOD_CONFIG_REPORT parameter to call of GetReportHTML.

After the call of this, if the Report Format is Configurable (i.e. EPOD_CONFIG_REPORT as a valid DAL object and has a value) and Images are included in this generation (ECR_EMAIL_INC_IMAGES_IND > 0) and they are to be split (ECR_EMAIL_IMAGES_IND == 2):

- Save the ReportHTML into a new variable (ImageHTML)
- In ReportHTML, remove images by replacing with a pattern match through the comments added above.
- In ImageHTML, remove POD by replacing with pattern match through comments added above.

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- Call EPOD_SYS_EMAIL.GeneratePDFFromHTML on ReportHTML as normal, adding the parameter for orientation, defaulting to "P" if not present. Store as object PDF.
- Call EPOD_SYS_EMAIL.GeneratePDFFromHTML a second time for imageHTML if present. Store as object ImagesPDF.
- For each PDF object generated, call SendFile to export the file through the parameters specified. Note that the images file must have "_images" appended to the filename, by appending this to the value of EPOD_XF_CONFIG.EPL_FILENAME before calling SendFile for the Images PDF. For example, in this configuration, a job with code "1234567890" with images will be generated as "POD_1234567890.pdf" for the POD and "POD_1234567890_images.pdf" for the images file.

Note: The comment pattern match will be as follows:

```
\<\!--\sPOD\sSTART.*POD\sEND\s--\> - for POD
\<\!--\sIMAGES\sSTART.*IMAGES\sEND\s--\> - for IMAGES
```


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8 Appendix A: TEST PLAN

Test Script / Scenario Reference	*POD DMS Export Images*	**Call Number(s): 343616 SCR-ADD-1**
Test Script / Scenario Description	*Testing the export to POD can split images.*	**PASS / ISSUES / FAIL**
Menu Access	*Administration/Auto-Export*	
Pre-requisites	*A system configured as Marshalls.*	**Tested By:**
Test Objective	*To test: Auto-Export may export POD and image files separately.*	**Date:**

Step	Action	Result	Remarks	P/F
1	**Export Tests**			
	For these tests: • *Set one configurable report format to split images (Marshalls) and one to not (Premier Mortars). Ensure both are including images.* • *Set another configurable report format to not email images.* • *Set another configurable report format to not have images at all.* • *Set these against 4 different job groups.* • *Configure site to auto-email on completion of jobs.* • *Configure site to have a POD export of type FILE to a known and accessible file system and POD2 export of type FTP. Set up an FTP site for this.* **Note:** Ensure all jobs are using a known OBS email address and all other jobs awaiting export are marked as complete before running the auto-export process. Complete 4 jobs for the 4 job groups, one for each report type. Ensure images are taken (Job Photo will be sufficient).			
1.01	Check Export email from AutoExport.	All jobs should have a report emailed to the email address against the jobs and the site email address. Every email should have a single attachment. Photos		

		will not be present in the job configured to not have images at all, and the job to not have email images.		
1.02	Check Export to POD in FILE system	The Job with the report configured for Split images should have two files, one named POD_(EPL_JOB_CODE).pdf containing just the POD, and one named POD_(EPL_JOB_CODE)_Images.pdf containing just the images. The Job with the report configured to not split images should have one file named POD_(EPL_JOB_CODE).pdf containing the POD and the images. The Job with the report configured to not display images should have one file named POD_(EPL_JOB_CODE).pdf containing just the POD. All files should be in the File folder.		
1.03	Check Export to POD in FTP server	The Job with the report configured for Split images should have two files, one named POD_(EPL_JOB_CODE).pdf containing just the POD, and one named POD_(EPL_JOB_CODE)_Images.pdf containing just the images. The Job with the report configured to not split images should have one file named POD_(EPL_JOB_CODE).pdf containing the POD and the images. The Job with the report configured to not display images should have one file named POD_(EPL_JOB_CODE).pdf containing just the POD. All files should be in the FTP folder.		
1.04	Run the report from Admin and click the Send email button from the produced report	All jobs should have a report emailed to the email address entered. Every email should have a single attachment. Photos will not be present in the job configured to not have images at all, and the job to not have email images.		

9 Appendix B: Quote & Document References

Cost Details				
Activity	**Estimate No. of Days**	**No. of Days**	**Rate per Day (?)**	**Cost (? Exc. VAT)**
Requirements	0.00	0.00	750	?0.00
Change Request Evaluation	0.00	0.00	750	?0.00
Functional Specification	0.75	0.75	750	?562.50
Technical Specification	0.00	0.00	750	?0.00
Development	2.25	2.25	750	?1,687.50
Testing and Release	0.50	0.50	750	?375.00
Implementation	0.25	0.25	750	?187.50
Project Management	0.25	0.25	750	?187.50
TOTAL	4.00	4.00		?3,000.00

Estimate excludes training, release to live and go live support.

B.1 References

Ref No	Document Title & ID	Version	Date
1	EST 343616 POD DMS Export Images	0.1	15/08/2017

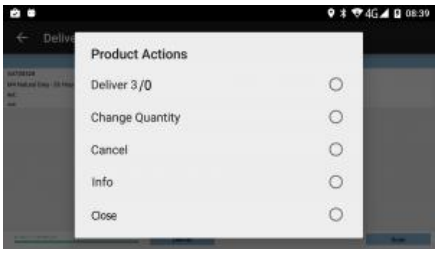
B.2 Glossary

Term	Definition
EPOD	Electronic Proof of Delivery. The OBS EPOD system is *CALIDUS* ePOD.
CALIDUS eSERV	The OBS mobile system to complete Service functionality in the field. This is part of the *CALIDUS* ePOD system.
PDA	The mobile device on which the C-ePOD system will run in the field. This can be a Phone, EDA or industrial PDA, running Android.
DAL	Data Access Layer. A mechanism for accessing data by the system that is removed from the application, allowing for simplified access and providing protection to the data, as only approved DAL methods can be used to modify it.
GPS	Global Positioning System. A mechanism of retrieving accurate positioning information in the form of Latitude and Longitude (Lat-Long) co-ordinates from a device.
GPRS, 3G, HSDPA, Data Service	All terms referring to mobile device network connectivity, and the speed at which the device connects to the internet.

B.3 Authorised By

Matt Turner	OBSL Account Manager	_____
Simon Martin	Customer Representative	_____
Debbie Linley	Customer Representative	_____

Product List

- 

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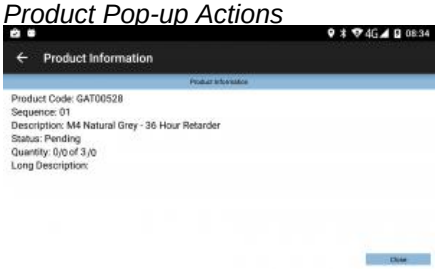
Product Pop-up Actions

- 

Product Info Pop-up

-

Change Product Quantity

Note: The screenshots above are intended solely to indicate the potential layout of the device with respect to the quantity when represented as case/unit, rather than representations of accurate customer job data or representations of the examples provided above.

9.1 Scope

Changes will be made to latest version of *CALIDUS* ePOD only, and will require an update to all application components and full system and user acceptance testing.

10 Set-up

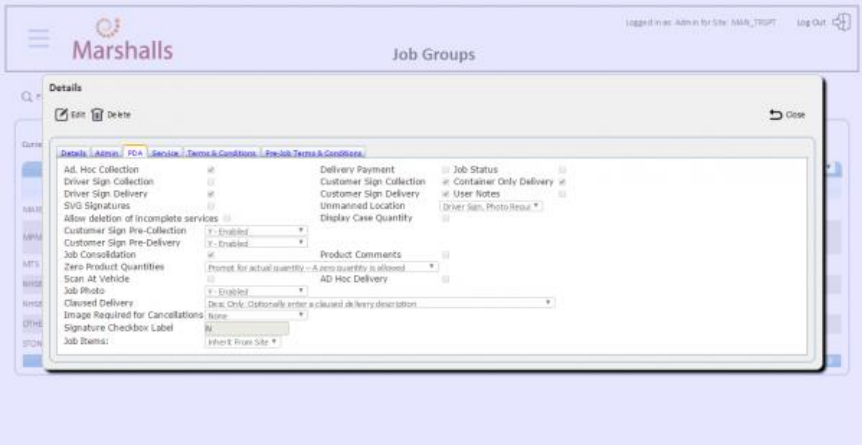
10.1 Pre-requisites

10.2 Menu Structure

10.3 Data

The Site configuration may be set as follows:

- The "Display Case Quantity" flag should be checked.



Job Groups Screen

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11 Functional Description

11.1 Database and Data Access Layer

The following fields will be added to the Job table EPOD_JOB_GROUPS:

- EPL_CASE_QTY_IND - integer, default value 0

This field will be added to all stored procedures in the database that require them.

This field is required to be exported to the mobile device.

These fields are not required to be used when filtering data for selection.

11.2 Admin

11.2.1 Job Groups Screen

The Job Groups screen (job_group.aspx) will be changed to add this new configuration flag.

Job Groups Screen

The new configuration flag EPL_CASE_QTY_IND will be added under the new Unmanned Location drop-down list.

This will be labelled as "Display Case Quantity", with the pop-up help of "Display Case and Unit Quantities on device, if appropriate".

This will be a checkbox, defined in the database as:

- 0 (default value), unchecked
- 1, checked

11.3 Mobile Device

11.3.1 Database & Data Access Layer

The following field will be added to the Job Group table EPOD_JOB_GROUPS:

- EPL_CASE_QTY_IND - int - default 0.

The PDA_JOB_GROUPS Data Access Layer object will be modified to support this field.

The Logon Response processor will populate this field from the data sent to the device at log on.

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11.3.2 Collection/Delivery screen

Note: See the overview of solution for a series of examples and test results to determine the correct method of operation on this screen, and for sample screens.

If the system is not configured to display case quantities (EPL_CASE_QTY_IND = 0), or the case quantity (EPL_PRODUCT_QTY_CASE) against the product line is 1 or 0, then the quantity will be displayed on the product list, pop-up action and pop-up info screen as now.

If the system is configured to display case quantities, and the case quantity against the product line is greater than 1, then the quantity label will be populated with the case quantity and the unit quantity separately, delimited by a slash ("/"). The case value will be populated by the quantity (EPL_PRODUCT_QTY_PLANNED and/or EPL_PRODUCT_QTY_ACTUAL) integer divided by the case quantity (EPL_PRODUCT_QTY_CASE). The units will be the remainder of this calculation. This will be applied to the product list, pop-up action and pop-up info screen.

Note that the pop-up action event handler must also be updated to use the new label, if appropriate.

The Set Quantity popup form must also be modified to support this 2-UOM functionality.

Two new fields will be added to the screen for display. They (and the existing quantity field) will be determined to be shown depending on the values of the new configuration flag and the value in the case quantity on the product line.

If the system is configured to display case quantities, and the case quantity against the product line is greater than 1, then the two new fields will be added to the display, and the existing quantity entry field will not be added.

If this is not the case, then the two new fields will not be added to the display, and the existing quantity entry field will be added to the display.

The two new fields will take up the space of the single quantity field as is now, with a label between them of a slash character. As this is a pop-up when quantities are zero, each field will be defaulted to 0.

The unit value entry will be validated that it does not exceed the case quantity.

For existing single quantity processing, the value entered will be moved to a total quantity variable, to store. For the new dual-quantity entry, the cases entered will be multiplied by the case quantity, and the unit value added to it, and placed in the same variable. This variable will be used to validate, and used to populate the delivered total quantity (EPL_PRODUCT_QTY_ACTUAL) on the product record.

11.3.3 Exceptions Screen

Two new fields will be added to the screen for display. They (and the existing quantity field) will be determined to be shown depending on the values of the new configuration flag and the value in the case quantity on the product line.

If the system is configured to display case quantities, and the case quantity against the product line is greater than 1, then the two new fields will be added to the display, and the existing quantity entry field will not be added.

If this is not the case, then the two new fields will not be added to the display, and the existing quantity entry field will be added to the display.

The two new fields will take up the space of the single quantity field as is now, with a label between them of a slash character.

The case value will be populated by the quantity (EPL_PRODUCT_QTY_PLANNED and/or EPL_PRODUCT_QTY_ACTUAL, depending on whether the product has already been delivered), integer divided by the case quantity (EPL_PRODUCT_QTY_CASE). The units will be the remainder of this calculation.

The unit value entry will be validated that it does not exceed the case quantity.

For existing single quantity processing, the value entered will be moved to a total quantity variable, to store. For the new dual-quantity entry, the cases entered will be multiplied by the case quantity, and the unit value added to it, and placed in

the same variable. This variable will be used to validate, and used to populate the delivered total quantity (EPL_PRODUCT_QTY_ACTUAL) on the product record.

See the overview of solution for a series of examples and test results to determine the correct method of operation on this screen, and for sample screens.

11.3.4 Signature Screen

The Signature screen displays a summary of products delivered on a Products tab. This will also be modified for 2-UOM functionality.

When building the list, the quantity is currently added to the label as the unit quantity. If the new flag is not set, or the case quantity is 0 or 1, this will continue to be the case.

If not, the quantity will be added to the label as cases and units, with a slash character between them. The case value will be populated by the quantity (EPL_PRODUCT_QTY_PLANNED and/or EPL_PRODUCT_QTY_ACTUAL, depending on whether the product has already been delivered), integer divided by the case quantity (EPL_PRODUCT_QTY_CASE). The units will be the remainder of this calculation.

No other changes are required to the list.

See the overview of solution for a series of examples and test results to determine the correct method of operation on this screen.

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12 Appendix A: TEST PLAN

Test Script / Scenario Reference	*Product Quantity to use Pack Size*	**Call Number(s): 343972 SCR-339876-05**
Test Script / Scenario Description	*Testing the Case/Unit quantity display on the mobile device.*	**PASS / ISSUES / FAIL**
Menu Access	*Administration/Auto-Import*	
Pre-requisites	*A system configured as Marshalls.*	**Tested By:**
Test Objective	*To test that Case and Unit quantities are displayed and entered as required on the mobile device application.*	**Date:**

Step	Action	Result	Remarks	P/F
1	**Admin (Configuration)**			
1.01	Test that the new configuration flag can be set, saved and shown in the Job Group screen.	The new flag can be set. The default value is as expected. The label and pop-up help are present and correct. The value is displayed correctly in the screen.		

Step	Action	Result	Remarks	P/F
2	**Mobile Device Application**			
	Ensure that there are jobs of two job groups, one with Display Case Quantities enabled, and one without. Ensure that there are products on each as follows: • *Case quantity (Pack Size) of 200, planned quantity of 1000* • *Case quantity (Pack Size) of 50, planned quantity of 99* • *Case quantity (Pack Size) of 100, planned quantity of 99* • *Case quantity (Pack Size) of 0, planned quantity of 50* • *Case quantity (Pack Size) of 0, planned quantity of 0* • *Case quantity (Pack Size) of 50, planned quantity of 0*			

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2.01	Start the job for the job group without case quantity display. Check the Product List.	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the product list will be displayed as "1000 of 1000". • Where the product total quantity is 99, and the pack size is 50, the product list will be displayed as "99 of 99". • Where the product total quantity is 99, and the pack size is 100, the product list will be displayed as "99 of 99". • Where the product total quantity is 50, and the pack size is 1 or 0, the product list will be displayed as "50 of 50". • Where the product total quantity is 0, and the pack size is 1 or 0, the product list will be displayed as "0 of 0". • Where the product total quantity is 0, and the pack size is 50, the product list will be displayed as "0 of 0".		
2.02	Press each of the product lines (with a non-zero quantity) and check the pop-up product action.	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the action will be displayed as "Deliver 1000". • Where the product total quantity is 99, and the pack size is 50, the action will be displayed as "Deliver 99". • Where the product total quantity is 99, and the pack size is 100, the action will be displayed as "Deliver 99". • Where the product total quantity is 50, and the pack size is 1 or 0, the action will be displayed as "Deliver 50".		
2.03	Press each of the product lines (with a non-zero quantity) and select Info.	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the product list will be displayed as "0 of 1000". • Where the product total quantity is 99, and the pack size is 50, the product list will be displayed as "0 of 99".		

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		• Where the product total quantity is 99, and the pack size is 100, the product list will be displayed as "0 of 99". • Where the product total quantity is 50, and the pack size is 1 or 0, the product list will be displayed as "0 of 50".		
2.04	For each product with a zero quantity, press on the line.	The results are as follows: • Where the product total quantity is 0, and the pack size is 1 or 0, the pop-up will be displayed with 1 quantity field. • Where the product total quantity is 0, and the pack size is 50, the pop-up will be displayed with 1 quantity field.		
2.05	For each product with a zero quantity, change the quantity (assuming to 55) and confirm.	The quantity is accepted and the line is confirmed.		
2.06	Press each of the product lines (with a non-zero quantity) and select "Change Quantity"	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the field is preset with the value "1000". • Where the product total quantity is 99, and the pack size is 50, the field is preset with the value "99". • Where the product total quantity is 99, and the pack size is 100, the field is preset with the value "99". • Where the product total quantity is 50, and the pack size is 1 or 0, the field is preset with the value "50".		
2.07	For each product, change the quantity from the original value and confirm.	The signature screen is displayed, showing: • Where the product total quantity is 1000, and the pack size is 200, the list will be displayed as "1000 * XXX - First Product". • Where the product total quantity is 99, and the pack size is 50, the list will be displayed as "99 * XXX - First Product". • Where the product total quantity is 99, and the pack size is 100, the list will be displayed as "99 * XXX - First Product".		

		• Where the product total quantity is 50, and the pack size is 1 or 0, the list will be displayed as "50 * XXX - First Product". • Where the product total quantity is 0, and the pack size is 1 or 0, the list will be displayed as "55 * XXX - First Product". • Where the product total quantity is 0, and the pack size is 50, the list will be displayed as "55 * XXX - First Product".		
2.08	Sign and confirm delivery.	The quantity as entered is reflected in the actual quantity in Admin, as a total quantity change.		
2.09	Start the job for the job group with case quantity display. Check the Product List.	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the product list will be displayed as "5/0 of 5/0". • Where the product total quantity is 99, and the pack size is 50, the product list will be displayed as "1/49 of 1/49". • Where the product total quantity is 99, and the pack size is 100, the product list will be displayed as "0/99 of 0/99". • Where the product total quantity is 50, and the pack size is 1 or 0, the product list will be displayed as "50 of 50". • Where the product total quantity is 0, and the pack size is 1 or 0, the product list will be displayed as "0 of 0". • Where the product total quantity is 0, and the pack size is 50, the product list will be displayed as "0/0 of 0/0".		
2.10	Press each of the product lines (with a non-zero quantity) and check the pop-up product action.	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the action will be displayed as "Deliver 5/0". • Where the product total quantity is 99, and the pack size is 50, the action will be displayed as "Deliver 1/49". • Where the product total quantity is 99, and the pack size is 100, the action will be displayed as "Deliver 0/99".		

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		• Where the product total quantity is 50, and the pack size is 1 or 0, the action will be displayed as "Deliver 50".		
2.11	Press each of the product lines (with a non-zero quantity) and select Info.	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the product list will be displayed as "0/0 of 5/0". • Where the product total quantity is 99, and the pack size is 50, the product list will be displayed as "0/0 of 1/49". • Where the product total quantity is 99, and the pack size is 100, the product list will be displayed as "0/0 of 0/99". • Where the product total quantity is 50, and the pack size is 1 or 0, the product list will be displayed as "0 of 50".		
2.12	For each product with a zero quantity, press on the line.	The results are as follows: • Where the product total quantity is 0, and the pack size is 1 or 0, the pop-up will be displayed with 1 quantity field. • Where the product total quantity is 0, and the pack size is 50, the pop-up will be displayed with a case and unit field.		
2.13	For the first zero product, change the quantity (assuming to 55) and confirm.	The quantity is accepted and the line is confirmed.		
2.14	For the second zero product, change the unit value to greater than 50 and confirm.	An error will be displayed.		
2.15	For the second zero product, change the case and unit values to valid values (assuming 1/5) and confirm.	The quantity is accepted and the line is confirmed.		
2.16	Press each of the product lines (with a non-zero quantity) and select "Change Quantity"	The results are as follows: • Where the product total quantity is 1000, and the pack size is 200, the first (cases) field will be preset with the value "5" and the second (units) field preset with the value "0". • Where the product total quantity is 99, and the pack size is 50, the first (cases) field will be preset with the value "1" and the second (units) field preset with the value "49".		

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		• Where the product total quantity is 99, and the pack size is 100, the first (cases) field will be preset with the value "0" and the second (units) field preset with the value "99". • Where the product total quantity is 50, and the pack size is 1 or 0, a single field will be displayed, preset with the value "50".		
2.17	For the first product, change the unit quantity to a value greater than 200 and confirm.	An error will be displayed.		
2.18	For each product, change the quantity from the original value to valid values and confirm.	The signature screen is displayed, showing: • Where the product total quantity is 1000, and the pack size is 200, the list will be displayed as "5/0 * XXX - First Product". • Where the product total quantity is 99, and the pack size is 50, the list will be displayed as "1/49 * XXX - First Product". • Where the product total quantity is 99, and the pack size is 100, the list will be displayed as "0/99 * XXX - First Product". • Where the product total quantity is 50, and the pack size is 1 or 0, the list will be displayed as "50 * XXX - First Product". • Where the product total quantity is 0, and the pack size is 1 or 0, the list will be displayed as "55 * XXX - First Product". • Where the product total quantity is 0, and the pack size is 50, the list will be displayed as "1/5 * XXX - First Product".		
2.19	Sign and confirm delivery.	The quantity as entered is reflected in the actual quantity in Admin, as a total quantity change.		

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13 Appendix B: Quote & Document References

Cost Details				
Activity	**Estimate No. of Days**	**No. of Days**	**Rate per Day (?)**	**Cost (? Exc. VAT)**
Requirements	0.00	0.00	750	?0.00
Change Request Evaluation	0.00	0.00	750	?0.00
Functional Specification	1.50	0.75	750	?562.50
Technical Specification	0.00	0.00	750	?0.00
Development	7.00	7.00	750	?5,250.00
Testing and Release	0.75	1.50	750	?1,125.00
Implementation	0.25	0.25	750	?187.50
Project Management	0.50	0.50	750	?375.00
TOTAL	10.00	10.00		?7,500.00

Estimate excludes training, release to live and go live support.

B.1 References

Ref No	Document Title & ID	Version	Date
1	REQ 339867 Marshalls Premier Mortars Solution Design	1.3	25/05/2017

B.2 Glossary

Term or Acronym	Meaning
General Definitions	
EPOD	Electronic Proof of Delivery. The OBSL EPOD system is *CALIDUS* ePOD. This also comprises the basis of the Service Completion system *CALIDUS* eServ.
Server	The portion of the *CALIDUS* ePOD/eServ systems that controls all the data and sends information to and receives updates from the mobile device.
Mobile Device; PDA	The device used by the driver to perform the jobs. Typically an Android mobile device or tablet.
Site	The site usually defines the depot, business or the transport group (carrier). It can be set to any value required by the customer. All transactions data (for example, loads and jobs) and standing data (for example, vehicles and uses) belong to a site. An EPOD user, on a device or in the Admin screen, can only see data for one site at a time.
Load	A single journey for the driver with a set of work attached. A load is identified by a unique load ID. This may also be referred to as a worklist or workload.
Job	Also Consignment. A single task for the driver as a specific location. This could be the collection of goods or the delivery of goods. Jobs may also be Services (for example, servicing, installing or de-installing a boiler). A job is identified by a unique job ID but can also have other references held against the job (e.g. job code, SO number, customer reference and external reference).
Job Group	Jobs must be tagged with a Job Group. All jobs tagged with a single job group are processed in the same way. The job group has configuration associated to it to control such items as: POD/POC Report settings; Pre-Job actions (such as signing at a gatehouse); Post-Job actions (such as who signs for the item, are photos required); configurable fields required for entry for the jobs; Terms and Conditions displayed and; driver/user process (such as photos required for cancellation, comments/notes allowed). The job group can be used for any or all Sites, and the configuration against the job group can be different in each site. Job Groups can also be restricted from Admin and Remote users, so that certain users only see jobs for certain groups.
Container	A generic term for any object that contains the items being collected or delivered. Examples of containers are: Pallet; Package; Carton; Item; Cage. A special container "Loose Products" - see Product below. A container is identified by a container ID which is unique to this physical container.
Product	A product is any goods that are being collected or delivered where the product has a 'Product Code' which identifies what the product is but which does not uniquely identify each individual item. A product will also have a quantity associated with it to indicate how many items of this 'Product Code' are being collected or delivered. Products can either be processed within a 'Container' or as 'Loose Products' without a 'Container'.
Owner	

Term or Acronym	Meaning
	The owner of the order that created the job. Typically this is the sales team that took the order and will be responsible for dealing with queries from the customer regarding the status.
Operator; Executor	The Site (depot or carrier) that is executing the load or loads that are involved in the delivery of the items.
Item Related Definitions	
Job Code	A reference associated with a job or job(s). This reference is common to connected jobs, for example this would be the same on both the collection of goods and the associated delivery of the same goods. Typically this would be the transport unique reference.
SO Number	A reference associated with a job which indicates the "Sales Order Number" this job is associated with.
Customer Reference	A reference associated with a job which has been provided by and will be recognised by the customer.
External Reference	A reference associated with a job which does not match any of the existing references, usually because it has been provided by an external system.
Pallet	An alternative for 'Container'. The term pallet is used when the operation only uses portable platforms as the container for goods.
Package	An alternative for 'Container'. The term package is used when the operation only uses boxes or wrapping as containers for goods.
Package Code	A code representing the type of 'Container'.
Package Desc	A description of the type of 'Container'.
Product Code	A code which identifies what a product is.
Item	A generic term for any individual item that can be collected or delivered. An item can represent a 'Container' or a 'Product'. This can also be used as an alternative for 'Container' when the operation only treats the goods as individual items, i.e. not as identifiable products.
Service Item	An item which will be serviced by a service job. See action 'Service'.
Issue Life	The time after which an item is no longer fit for purpose.
Pack Size; Case Quantity	A product may consist of a full quantity of items, inside a pack. The Pack Size (or Case Quantity) defines the amount of this product contained in a single pack. For example, if there are 85 items to deliver, with a pack size of 24, the number of full packs is determined to be 3 (24 * 3, or 72), with the remaining (13) being 'loose' quantity. This is displayed as "3/13" on the mobile application.
UOM; Item Type	Unit of Measure; The major (case) UOM. This can optionally be displayed on the mobile device when changing product quantities.
Product Type	A classification of the product being delivered. For example, a company may deliver 7 different mortar products and 80 different concrete slab products. The Product Types may be set to "MORTAR" and "SLABS". This may be used to attach additional configuration, changing the data required when collecting or delivering these product types.
Status Definitions	
Status	An indicator of how far through the processing a 'Job', 'Container' or 'Product' has progressed.
Pending	A status indicating that the processing has not yet started, but is required to be completed.
In Progress	A status indicating that processing has started but not yet finished.
Complete	A status indicating that the 'Job', 'Container' or 'Product' has been collected or delivered.
Complete (Amended)	A status indicating that the 'Job', 'Container' or 'Product' has been collected or delivered but that some changes or amendments have been made. This means that not everything that was planned to be collected or delivered was collected or delivered, some items may have been cancelled or some products may only have had some of the planned quantities collected or delivered.
Complete (Claused)	A status indicating that the processing has been finished but that a 'Clause' condition has been recorded for this item.
Claused	See 'Complete (Claused)' and action 'Clause'.
Cancelled	A status indicating that the processing of this item or job is no longer required.
Cancelled at Collection	A status indicating that the delivery of a container or product is no longer required because the associated collection of this container or product was cancelled.
Submitted	An optional status that applies only to a 'Job' and which occurs after the 'Job' has been completed. This indicates that any time and expenses information recorded for the 'Job' has been submitted back to the server and can no longer be altered.
Action Definitions	
Start	

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Term or Acronym	Meaning
	An action associated with a 'Job' meaning the driver is about to start the processing of this job or jobs. This action will mark the job(s) with a status of 'In Progress'.
Arrive	A conditional action associated with a 'Job' meaning the driver has arrived at the location the goods should be collected from or delivered to.
Continue	An action associated with a 'Job' meaning the driver has previously performed the 'Start' and/or 'Arrive' action and has exited the processing screen but is now going to continue the processing.
Collect	An action associated with a specific 'Container' or a 'Product' meaning the driver has collected the 'Container' or 'Product'. This action will mark the 'Container' or 'Product' with a status of 'Complete' or 'Complete (Amended)'.
Collect Claused	An action associated with a specific 'Container' or a 'Product' meaning the driver has collected the 'Container' or 'Product' but with a condition under which the collection was accepted. This action will accept the clause condition and then mark the 'Container' or 'Product' with a status of 'Complete (Claused)'.
Deliver	An action associated with a specific 'Container' or a 'Product' meaning the driver has delivered the 'Container' or 'Product'. This action will mark the 'Container' or 'Product' with a status of 'Complete' or 'Complete (Amended)'.
Deliver Claused	An action associated with a specific 'Container' or a 'Product' meaning the driver has delivered the 'Container' or 'Product' but with a condition under which the delivery was accepted. This action will accept the clause condition and then mark the 'Container' or 'Product' with a status of 'Complete (Claused)'.
Clause	An action associated with a specific 'Container' or a 'Product' that has already been collected or delivered meaning the collection or delivery has been accepted with a condition. This action will accept the clause condition and then mark the 'Container' or 'Product' with a status of 'Complete (Claused)'.
Cancel	An action associated with a 'Job', 'Container' or 'Product' meaning the collection or delivery will not be performed for this 'Job', 'Container' or 'Product'.
Submit	An optional action which can conditionally be carried out after a 'Job' has been collection or delivered meaning that any/all required expense or time recording for this 'Job' has been completed and can be submitted back to the server.
Service	A service of a service item or items. Typically, Installation, Deinstallation or Service. The process of a service usually encompasses Pre- and Port-work checks, information gathering and diagnosis and resolution notes. Additional references (MC Refs) may also be captured.
Actioned	A general term describing completing a job. So, 'Actioned' may be used instead of 'Collected', 'Serviced', 'Delivered'.
Consolidate	The action of taking several jobs and linking them together, so they are actioned at the same time with one start, arrive and signature.
Deconsolidate	The action of taking a consolidation of jobs and breaking them down into the component jobs again.
Job Swap	The action of selecting an existing load not assigned to the user, and picking jobs to transfer onto the user's load.
Signature Capture	Usually the final action of a job, where the customer's name and signature are entered.
Other Definitions	
Reason Code	A code which represents the reason that a job was cancelled or an item was cancelled or claused.
Vehicle	The vehicle used for transporting the goods.
Vehicle Checks	Also Defect Checks. A series of questions representing the results of checks intended to ensure the vehicle is in an acceptable condition.
Metrics Entry	A series of questions to capture information either at the start or end of a 'Load'.
Driver	The person performing the collections or deliveries; the user of the device/application.
Engineer	The person performing the services; the user of the device/application.
Customer	The person/company the goods are being collected from or delivered to.
Signatory	The name of the person providing a signature.
T&Cs	Terms and Conditions. The T&Cs are shown when signatures are prompted for. The text of the T&Cs are defined in the system itself.
Transfer Load	A load select from which to swap jobs to the user's load.
Base	E.g. 'Return to Base'. Typically the depot from which the driver departed.
Unplanned Ad Hoc Collection	A collection job that is created by the driver, usually after delivering to a customer.

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Term or Acronym	Meaning
Ad Hoc Container Entry/Scanning	The process of adding containers (items) to a job that have not been pre-advised on the job.
Completion Report	POD, POC, Service/Work Report.
Load Assignment	The action of assigning a vehicle and/or a driver to a load.
Job Assignment	The action of putting jobs onto a load.
Collection/Delivery Windows; Access Windows	Periods of time between which it is acceptable to deliver or collect from that customer. This has limited use in the system, mostly for reporting purposes.
Location/Map Terms	
Lat-Longs; GPS Co-ordinates, GPS Position	Latitude and Longitude co-ordinates, specified together as a single entity, identifying the exact position of a location. There are multiple formats - *CALIDUS* ePOD uses decimal notation, for example "53.3490818,-2.8521498" identifies the OBS Logistics office building in Liverpool.
GPS	Global Positioning System; the satellite system used to obtain a GPS position, for use with navigation and location positioning.
Geocode; Reverse Geocode	Geocoding is the process of obtaining lat-longs from an address. Reverse Geocoding is the process obtaining an address from lat-longs.
Geofence; Geofence Break	A Geofence is a perimeter around a location. A Geofence Break occurs when a device passes through this perimeter on entry or exit from the location.

B.3 Authorised By

Matt Turner	OBSL Account Manager	_____
Simon Martin	Customer Representative	_____
Debbie Linley	Customer Representative	_____

Long Description will be used instead of Description on the Products list.

Developer Notes: *This will be achieved by changing the 'MAR-LAND' PDA Style for the product list from:*

```
"ProdList_Items": [
  "lblProductID",
  "lblPackSize",
  "lblProductUnitType",
  "lblProductPlannedQty",
  "lblProductDesc"
],
```

to this:

```
"ProdList_Items": [
  "lblProductID",
  "lblPackSize",
  "lblProductUnitType",
  "lblProductPlannedQty",
  "lblLongDesc"
],
"ProdList_lblLongDesc": {
  "width": "98%",
  "left": "1%",
  "color": "#000000",
  "font": {
    "fontSize": "16 * Ti.App.resMod"
  }
},
```

The Product Quantity entry screen (called when changing product quantity or entering comments) will be modified to split Packs and Loose Items to separate lines for actual quantity, plus UOM on second line.

The original layout in the quantity change section is as follows:

```
Original Quantity   CCCCC / UUUUU
New Quantity        CCCCC /
```


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```
                        UUUUU   UOM
```

Note: Planned quantity fields layout will not be affected by this change.

The new layout for MLP will be as follows:

```
Original Quantity   CCCCC / UUUUU
Packs               CCCCC
Loose Items         UUUUU   UOM
```

Note: For Change Quantity exceptions, the screen will display following this layout. For Product Comment/Clausing, the layout will move the "Original Quantity" values to the view on the left.

Developer Notes: *To achieve this, the UOM field will be added to the display, hidden by default.*

The MLP style will be modified to show this field, and also to explicitly move the loose quantity to a new line, pushing all other fields down.

The separator used ("/") will be changed to be a stylable item, with the slash as a default value.

The MLP style will override this label with the value "Loose". The width of the item will be such that it is moved to the line below.

The "New Quantity" label ("newQty") will be translated to "Packs" for the MLP PDA style.

13.1 Exception Process

The Product exception processes above must also be modified to show the product long description rather than the product description, as it does now. This requires the elements of the view to be configurable through the style.

Developer Notes: *The style for the cancellation info view ("Cancellation_vwInfoScroll") will be modified to have an "options" or "layout" property.*

This will be set to an object, with properties of each type of exception. Each exception type will have an array of items that will be displayed on the view panel.

The following shows all the allowed elements in this configuration item:

```
vwInfoScroll_items {
    "JOBS" : ["CancelText", "JobId", "CustName"],
    "SERVICE_JOB" : ["CancelText", "JobId", "CustName"],
    "SERVICE_ITEM" : ["CancelText"],
    "CONTAINER" : ["CancelText", "JobId", "CustName", "LinkedJobs", "ContID", "PackageCode", "ContPackDe
    "CLAUSE_CONTAINER" : ["CancelText", "JobId", "CustName", "LinkedJobs", "ContID", "PackageCode", "Cor
    "PRODUCT" : ["CancelText", "JobId", "CustName", "ProdContID", "ProdDesc", "ProdDescLong", "PlanQty",
    "CLAUSE_PRODUCT" : ["CancelText", "JobId", "CustName", "ProdContID", "ProdDesc", "ProdDescLong", "Pl
    "CHANGE_QTY" : ["CancelText", "JobId", "CustName", "ProdContID", "ProdDesc", "ProdDescLong", "PlanQt
}
```

The default values for this object will be stored in the application's system style as follows:

```
vwInfoScroll_items {
    "JOBS" : ["CancelText", "JobId", "CustName"],
    "SERVICE_JOB" : ["CancelText", "JobId", "CustName"],
    "SERVICE_ITEM" : ["CancelText"],
    "CONTAINER" : ["CancelText", "JobId", "CustName", "LinkedJobs", "ContID", "PackageCode", "ContPackDe
    "CLAUSE_CONTAINER" : ["CancelText", "JobId", "CustName", "LinkedJobs", "ContID", "PackageCode", "Cor
    "PRODUCT" : ["CancelText", "JobId", "CustName", "ProdDesc"],
    "CLAUSE_PRODUCT" : ["CancelText", "JobId", "CustName", "ProdDesc"],
    "CHANGE_QTY" : ["CancelText", "JobId", "CustName", "ProdDesc"]
}
```

The MLP PDA style will style this as follows:

```
vwInfoScroll_items {
    "JOBS" : ["CancelText", "JobId", "CustName"],
    "SERVICE_JOB" : ["CancelText", "JobId", "CustName"],
    "SERVICE_ITEM" : ["CancelText"],
```

```
        "CONTAINER" : ["CancelText", "JobId", "CustName", "LinkedJobs", "ContID", "PackageCode", "ContPackDe
        "CLAUSE_CONTAINER" : ["CancelText", "JobId", "CustName", "LinkedJobs", "ContID", "PackageCode", "Cor
        "PRODUCT" : ["CancelText", "JobId", "CustName", "ProdDescLong", "PlanQty", "ProdUOM"],
        "CLAUSE_PRODUCT" : ["CancelText", "JobId", "CustName", "ProdDescLong", "PlanQty"],
        "CHANGE_QTY" : ["CancelText", "JobId", "CustName", "ProdDescLong"]
    }
```

The process building the view panel will check for this configuration element before building it. If it doesn't exist in the custom style, the default system style will be checked and this will be used.

The process will loop through the configuration array elements and only add those listed.

Config Element	Field to Add	Notes
"CancelText"	"jobCancelLB"	
"JobId"	"lblJobId"	Only added if the Job DAL object is present.
"CustName"	"lblCustName"	Only added if the Job DAL object is present.
"LinkedJobs"	"lblLinkedJobId", "lblLinkedCustName"	Add only if the data object type is "PDA_CONTAINER". Add only for linked containers i.e. consolidated across jobs. Add for each linked job's container. The labels have been renamed here to include the text "Linked".
"ContID"	"lblContID"	Add only if the data object type is "PDA_CONTAINER".
"PackageCode"	"lblPackageCode"	Add only if the data object type is "PDA_CONTAINER".
"ContPackDesc"	"lblContPackageDesc"	Add only if the data object type is "PDA_CONTAINER".
"ContDescLong"	"lblContDescLong"	This is a new field. Add only if the data object type is "PDA_CONTAINER".
"ContWt"	"lblContWt"	Add only if the data object type is "PDA_CONTAINER".
"ContC1"	"lblContC1"	Add only if the data object type is "PDA_CONTAINER".
"ContC2"	"lblContC2"	Add only if the data object type is "PDA_CONTAINER".
"ContC3"	"lblContC3"	Add only if the data object type is "PDA_CONTAINER".
"ProdDesc"	"lblProdDesc"	This is a new field. Add only if the data object type is "PDA_PRODUCT".
"ProdDescLong"	"lblProdDescLong"	This is a new field. Add only if the data object type is "PDA_PRODUCT".
"PlanQty"	See below for details.	These are new fields. Add only if the data object type is "PDA_PRODUCT".
"ProdUOM"	"lblProdUOM"	This is a new field. Add only if the data object type is "PDA_PRODUCT".

Developer Notes: *All fields are ID'd with the screen name on the front, for example, where this document specifies field "jobCancelLB", this is added to the screen as "Cancellation_jobCancelLB".*

When adding "PlanQty" to the view panel, the field should be generated in exactly the same way as they are added to the quantity entry view as now, with the same IDs. Further, a variable should be set to show that the planned fields have been added to the Info view. This will be checked when building the quantity entry view and, if set to true, the planned quantity fields will *not* be added to the quantity entry view.

Change the function CancellationText for types "PRODUCT", "CLAUSE_PRODUCT" and "CHANGE_QTY" to not include the description in the cancellation text.

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14 Appendix A: Quote & Document References

Cost Details				
Activity	**Estimate No. of Days**	**No. of Days**	**Rate per Day (?)**	**Cost (? Exc. VAT)**
Requirements	0.00	0.00	750	?0.00
Change Request Evaluation	0.00	0.00	750	?0.00
Functional Specification	0.75	0.75	750	?562.50
Technical Specification	0.00	0.00	750	?0.00
Development	3.00	3.00	750	?2,250.00
Testing and Release	0.50	0.50	750	?375.00
Implementation	0.25	0.25	750	?187.50
Project Management	0.25	0.25	750	?187.50
TOTAL	4.75	4.75		?3,562.50

Estimate excludes training, release to live and go live support.

A.1 References

Ref No	Document Title & ID	Version	Date
1			

A.2 Glossary

Term or Acronym	Meaning
General Definitions	
EPOD	Electronic Proof of Delivery. The OBSL EPOD system is *CALIDUS* ePOD. This also comprises the basis of the Service Completion system *CALIDUS* eServ.
Server	The portion of the *CALIDUS* ePOD/eServ systems that controls all the data and sends information to and receives updates from the mobile device.
Mobile Device; PDA	The device used by the driver to perform the jobs. Typically an Android mobile device or tablet.
Site	The site usually defines the depot, business or the transport group (carrier). It can be set to any value required by the customer. All transactions data (for example, loads and jobs) and standing data (for example, vehicles and uses) belong to a site. An EPOD user, on a device or in the Admin screen, can only see data for one site at a time.
Load	A single journey for the driver with a set of work attached. A load is identified by a unique load ID. This may also be referred to as a worklist or workload.
Job	Also Consignment. A single task for the driver as a specific location. This could be the collection of goods or the delivery of goods. Jobs may also be Services (for example, servicing, installing or de-installing a boiler). A job is identified by a unique job ID but can also have other references held against the job (e.g. job code, SO number, customer reference and external reference).
Job Group	Jobs must be tagged with a Job Group. All jobs tagged with a single job group are processed in the same way. The job group has configuration associated to it to control such items as: POD/POC Report settings; Pre-Job actions (such as signing at a gatehouse); Post-Job actions (such as who signs for the item, are photos required); configurable fields required for entry for the jobs; Terms and Conditions displayed and; driver/user process (such as photos required for cancellation, comments/notes allowed). The job group can be used for any or all Sites, and the configuration against the job group can be different in each site. Job Groups can also be restricted from Admin and Remote users, so that certain users only see jobs for certain groups.
Container	A generic term for any object that contains the items being collected or delivered. Examples of containers are: Pallet; Package; Carton; Item; Cage. A special container "Loose Products" - see Product below. A container is identified by a container ID which is unique to this physical container.
Product	A product is any goods that are being collected or delivered where the product has a 'Product Code' which identifies what the product is but which does not uniquely identify each individual item. A product will also have a quantity associated with it to indicate how many items of this 'Product Code' are being collected or delivered. Products can either be processed within a 'Container' or as 'Loose Products' without a 'Container'.
Owner	

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Term or Acronym	Meaning
	The owner of the order that created the job. Typically this is the sales team that took the order and will be responsible for dealing with queries from the customer regarding the status.
Operator; Executor	The Site (depot or carrier) that is executing the load or loads that are involved in the delivery of the items.
Item Related Definitions	
Job Code	A reference associated with a job or job(s). This reference is common to connected jobs, for example this would be the same on both the collection of goods and the associated delivery of the same goods. Typically this would be the transport unique reference.
SO Number	A reference associated with a job which indicates the "Sales Order Number" this job is associated with.
Customer Reference	A reference associated with a job which has been provided by and will be recognised by the customer.
External Reference	A reference associated with a job which does not match any of the existing references, usually because it has been provided by an external system.
Pallet	An alternative for 'Container'. The term pallet is used when the operation only uses portable platforms as the container for goods.
Package	An alternative for 'Container'. The term package is used when the operation only uses boxes or wrapping as containers for goods.
Package Code	A code representing the type of 'Container'.
Package Desc	A description of the type of 'Container'.
Product Code	A code which identifies what a product is.
Item	A generic term for any individual item that can be collected or delivered. An item can represent a 'Container' or a 'Product'. This can also be used as an alternative for 'Container' when the operation only treats the goods as individual items, i.e. not as identifiable products.
Service Item	An item which will be serviced by a service job. See action 'Service'.
Issue Life	The time after which an item is no longer fit for purpose.
Pack Size; Case Quantity	A product may consist of a full quantity of items, inside a pack. The Pack Size (or Case Quantity) defines the amount of this product contained in a single pack. For example, if there are 85 items to deliver, with a pack size of 24, the number of full packs is determined to be 3 (24 * 3, or 72), with the remaining (13) being 'loose' quantity. This is displayed as "3/13" on the mobile application.
UOM; Item Type	Unit of Measure; The major (case) UOM. This can optionally be displayed on the mobile device when changing product quantities.
Product Type	A classification of the product being delivered. For example, a company may deliver 7 different mortar products and 80 different concrete slab products. The Product Types may be set to "MORTAR" and "SLABS". This may be used to attach additional configuration, changing the data required when collecting or delivering these product types.
Status Definitions	
Status	An indicator of how far through the processing a 'Job', 'Container' or 'Product' has progressed.
Pending	A status indicating that the processing has not yet started, but is required to be completed.
In Progress	A status indicating that processing has started but not yet finished.
Complete	A status indicating that the 'Job', 'Container' or 'Product' has been collected or delivered.
Complete (Amended)	A status indicating that the 'Job', 'Container' or 'Product' has been collected or delivered but that some changes or amendments have been made. This means that not everything that was planned to be collected or delivered was collected or delivered, some items may have been cancelled or some products may only have had some of the planned quantities collected or delivered.
Complete (Claused)	A status indicating that the processing has been finished but that a 'Clause' condition has been recorded for this item.
Claused	See 'Complete (Claused)' and action 'Clause'.
Cancelled	A status indicating that the processing of this item or job is no longer required.
Cancelled at Collection	A status indicating that the delivery of a container or product is no longer required because the associated collection of this container or product was cancelled.
Submitted	An optional status that applies only to a 'Job' and which occurs after the 'Job' has been completed. This indicates that any time and expenses information recorded for the 'Job' has been submitted back to the server and can no longer be altered.
Action Definitions	
Start	

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Term or Acronym	Meaning
	An action associated with a 'Job' meaning the driver is about to start the processing of this job or jobs. This action will mark the job(s) with a status of 'In Progress'.
Arrive	A conditional action associated with a 'Job' meaning the driver has arrived at the location the goods should be collected from or delivered to.
Continue	An action associated with a 'Job' meaning the driver has previously performed the 'Start' and/or 'Arrive' action and has exited the processing screen but is now going to continue the processing.
Collect	An action associated with a specific 'Container' or a 'Product' meaning the driver has collected the 'Container' or 'Product'. This action will mark the 'Container' or 'Product' with a status of 'Complete' or 'Complete (Amended)'.
Collect Claused	An action associated with a specific 'Container' or a 'Product' meaning the driver has collected the 'Container' or 'Product' but with a condition under which the collection was accepted. This action will accept the clause condition and then mark the 'Container' or 'Product' with a status of 'Complete (Claused)'.
Deliver	An action associated with a specific 'Container' or a 'Product' meaning the driver has delivered the 'Container' or 'Product'. This action will mark the 'Container' or 'Product' with a status of 'Complete' or 'Complete (Amended)'.
Deliver Claused	An action associated with a specific 'Container' or a 'Product' meaning the driver has delivered the 'Container' or 'Product' but with a condition under which the delivery was accepted. This action will accept the clause condition and then mark the 'Container' or 'Product' with a status of 'Complete (Claused)'.
Clause	An action associated with a specific 'Container' or a 'Product' that has already been collected or delivered meaning the collection or delivery has been accepted with a condition. This action will accept the clause condition and then mark the 'Container' or 'Product' with a status of 'Complete (Claused)'.
Cancel	An action associated with a 'Job', 'Container' or 'Product' meaning the collection or delivery will not be performed for this 'Job', 'Container' or 'Product'.
Submit	An optional action which can conditionally be carried out after a 'Job' has been collection or delivered meaning that any/all required expense or time recording for this 'Job' has been completed and can be submitted back to the server.
Service	A service of a service item or items. Typically, Installation, Deinstallation or Service. The process of a service usually encompasses Pre- and Port-work checks, information gathering and diagnosis and resolution notes. Additional references (MC Refs) may also be captured.
Actioned	A general term describing completing a job. So, 'Actioned' may be used instead of 'Collected', 'Serviced', 'Delivered'.
Consolidate	The action of taking several jobs and linking them together, so they are actioned at the same time with one start, arrive and signature.
Deconsolidate	The action of taking a consolidation of jobs and breaking them down into the component jobs again.
Job Swap	The action of selecting an existing load not assigned to the user, and picking jobs to transfer onto the user's load.
Signature Capture	Usually the final action of a job, where the customer's name and signature are entered.
Other Definitions	
Reason Code	A code which represents the reason that a job was cancelled or an item was cancelled or claused.
Vehicle	The vehicle used for transporting the goods.
Vehicle Checks	Also Defect Checks. A series of questions representing the results of checks intended to ensure the vehicle is in an acceptable condition.
Metrics Entry	A series of questions to capture information either at the start or end of a 'Load'.
Driver	The person performing the collections or deliveries; the user of the device/application.
Engineer	The person performing the services; the user of the device/application.
Customer	The person/company the goods are being collected from or delivered to.
Signatory	The name of the person providing a signature.
T&Cs	Terms and Conditions. The T&Cs are shown when signatures are prompted for. The text of the T&Cs are defined in the system itself.
Transfer Load	A load select from which to swap jobs to the user's load.
Base	E.g. 'Return to Base'. Typically the depot from which the driver departed.
Unplanned Ad Hoc Collection	A collection job that is created by the driver, usually after delivering to a customer.

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Term or Acronym	Meaning
Ad Hoc Container Entry/Scanning	The process of adding containers (items) to a job that have not been pre-advised on the job.
Completion Report	POD, POC, Service/Work Report.
Load Assignment	The action of assigning a vehicle and/or a driver to a load.
Job Assignment	The action of putting jobs onto a load.
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Location/Map Terms	
Lat-Longs; GPS Co-ordinates, GPS Position	Latitude and Longitude co-ordinates, specified together as a single entity, identifying the exact position of a location. There are multiple formats - *CALIDUS* ePOD uses decimal notation, for example "53.3490818,-2.8521498" identifies the OBS Logistics office building in Liverpool.
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Geocode; Reverse Geocode	Geocoding is the process of obtaining lat-longs from an address. Reverse Geocoding is the process obtaining an address from lat-longs.
Geofence; Geofence Break	A Geofence is a perimeter around a location. A Geofence Break occurs when a device passes through this perimeter on entry or exit from the location.

A.3 Authorised By

Murray Middleton	OBS Project Manager	_____
Debbie Kitchen	Customer Representative	_____

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