Demo Script CTMS

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2 Introduction

Calidus Vision is a Visibility and Productivity tool, designed to represent data from diverse systems in a single view, displaying important information in meaningful screens designed to highlight performance and enhance visibility of issues in the host systems.

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3 Log-on

You are prompted to enter a user-name and password.
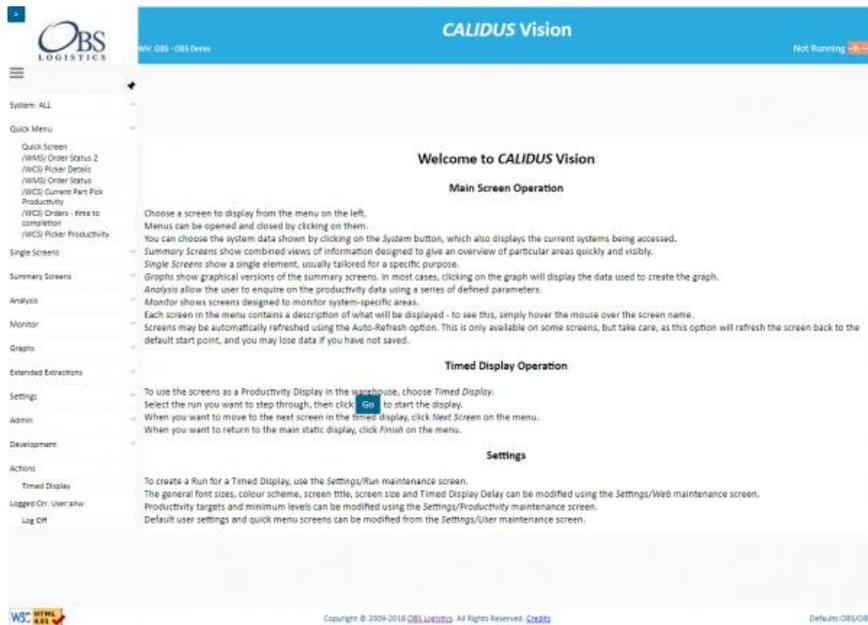
Login	
User-ID	
Password	
Log On	Clear

Security: At the moment Calidus Vision is expected to be installed within a secure network, so no secure URL is provided, although this has been done through the Portal for added security and can be added on your local installation. The user-name and password are secured through the database log-on parameters - if the user-name is not valid on that system, you will not be able to log in. Further, if the session expires (through inactivity), the user will be required to log in again.
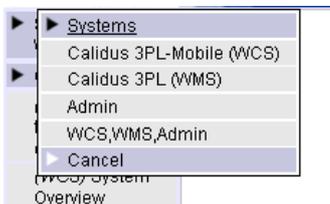
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4 Main Screen

This Home screen shows a very brief help, showing how to use the main functions in the system.

Also shown are the menu options and systems that you are allowed to access. This is achieved through a user-definable menu structure and a security level against each configured user and against the screens, allowing many ways of configuring the system and the menus for your use.

You can filter the menu quickly by each System by using the System view drop-down from the main menu. This will remove all items that have no meaning to the system being accessed. For a generic implementation linking to a WMS and WCS, these (and potentially the Admin functions) will be the only available options on this Systems pop-up.

Systems that have been included are:

- Calidus TMS (or other TMS)
- Calidus WMS (or other WMS)
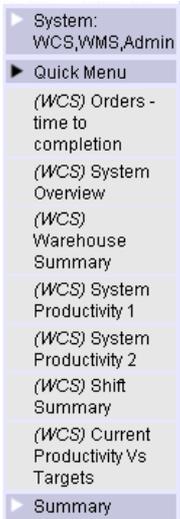- Calidus Mobile (or other RF system)

There also exists a standard set of XML import files to allow different WMS or WCS systems to provide data feeds to Calidus Vision.

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5 Menus

5.1 Quick Menu

The quick menu will be open upon starting the system. This is a set of screens chosen by the user (from any of their available screens) that they use every day.

► System: WCS,WMS,Admin
► Quick Menu
(WCS) Orders - time to completion
(WCS) System Overview
(WCS) Warehouse Summary
(WCS) System Productivity 1
(WCS) System Productivity 2
(WCS) Shift Summary
(WCS) Current Productivity Vs Targets
► Summary

5.2 Single Screens

Single screens are screens designed to show a single aspect of a data for a specific purpose.

For example:

- Orders Summary - this shows the total amount of picks available to be picked at the moment through the RF system.
- Daily Part Pick Productivity - this shows the actual performance of pickers on the current day, versus the target productivity rates.

5.2.1 TMS Screens

- Next Arrivals/Departures - Arrivals into and departures from the depot in the next 2 hours
- Trailer Utilisation - Haulier RPE utilisation information
- Tractor Utilisation - Fleet utilisation, per Carrier
- Driver Utilisation - Driver utilisation, per Carrier

Trailer Utilisation

Depot: OBSDEMO1 [Go]

Trailer	RPE Loaded	RPE Max	# Trips	RPE %	Planned Distance
BELLS TRUNK	23	44	1	52.27%	1,398
CHIPLOGIS	27	26	1	103.85%	491
CONNECT	27	26	1	103.85%	491
COOLXPRESS	54	52	2	103.85%	544
COOPERHAUL	24	26	1	92.31%	296
CORPORATE	74	78	3	94.87%	1,259
COULTHARD	103	104	4	99.04%	1,859
CUST COLL	122	156	6	78.21%	1,765
HOPKINSONS	22	26	1	84.62%	386
J FREIGHT	4	26	1	15.38%	339
MONTGOMERY	48	52	2	92.31%	907
N W TRUNK	35	44	1	79.55%	736
OBSDEMO1	2,032	2332	89	87.14%	27,098
RSL	26	26	1	100.00%	163
SA TRANSPORT	26	26	1	100.00%	293
SUBBILLING	30	26	1	115.38%	192
SUBKNOW	77	78	3	98.72%	820
SUBTARIF	26	26	1	100.00%	340
S W TRUNK	53	44	1	120.45%	2,154
T BRIERLEY	26	26	1	100.00%	312
TRADING	23	26	1	88.46%	169
WHIT TRUNK	20	26	1	76.92%	895
WIDDOWSON	78	78	3	100.00%	417
WILKINSONS W	42	52	2	80.77%	104

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Tractor Utilisation

Depot: OBSDEMO1 Carrier: (All Carriers) Go

Carrier	Tractor	# Trips	Trip Drive	Trip Elapsed	Planned Elapsed	Actual Elapsed	Elapsed Diff	Planned Drive	Actual Drive	Drive Diff
BELLS TRUNK	AY05 EHJ	1	1274	3,981	3,905	N/A	N/A	2,609	N/A	N/A
CORPORATE	KX54 DXY	1	366	567	1,293	N/A	N/A	1,211	N/A	N/A
COULTHARD	N6 GRM	1	393	587	1,320	N/A	N/A	1,278	N/A	N/A
COULTHARD	WA54 LZW	1	329	517	1,679	N/A	N/A	1,619	N/A	N/A
CUST COLL	GF57 ULT	1	647	1,346	383	N/A	N/A	357	N/A	N/A
HOPKINSONS	YH57EGZ	1	360	543	308	N/A	N/A	278	N/A	N/A
J FREIGHT	J777 JFR	1	486	641	7,267	N/A	N/A	7,243	N/A	N/A
N W TRUNK	FH57 DCV	1	650	1,539	3,466	N/A	N/A	3,244	N/A	N/A
OBSDEMO1	fj57 ojk	1	384	668	608	575	33	429	325	104
OBSDEMO1	FJ57 OJL	1	154	380	320	365	-45	214	-05	299
OBSDEMO1	fj57 ojm	1	521	923	863	780	83	566	402	164
OBSDEMO1	FJ57 OJO	1	346	1,502	1,471	N/A	N/A	725	N/A	N/A
OBSDEMO1	FJ57 OJP	2	410	1,478	1,358	590	268	455	365	90
OBSDEMO1	FJ57 OJR	1	315	805	745	570	175	360	290	70
OBSDEMO1	FJ57 OJS	2	474	1,198	1,078	815	263	606	-245	851

Driver Utilisation

Depot: OBSDEMO1 Carrier: (All Carriers) Go

Carrier	Driver #	Trips	Trip Drive	Trip Elapsed	Planned Elapsed	Actual Elapsed	Elapsed Diff	Planned Drive	Actual Drive	Drive Diff
BELLS TRUNK	77417	1	1274	3,981	3,905	N/A	N/A	2,609	N/A	N/A
CORPORATE	77320	1	366	567	1,293	N/A	N/A	1,211	N/A	N/A
COULTHARD	77301	1	393	587	1,320	N/A	N/A	1,278	N/A	N/A
COULTHARD	77424	1	329	517	1,679	N/A	N/A	1,619	N/A	N/A
CUST COLL	76700	1	647	1,346	383	N/A	N/A	357	N/A	N/A
HOPKINSONS	74197	1	360	543	308	N/A	N/A	278	N/A	N/A
J FREIGHT	17435	1	486	641	7,267	N/A	N/A	7,243	N/A	N/A
N W TRUNK	77438	1	650	1,539	3,466	N/A	N/A	3,244	N/A	N/A
OBSDEMO1	119	1	297	679	619	N/A	N/A	342	N/A	N/A
OBSDEMO1	121	1	252	382	322	350	-28	252	260	-8
OBSDEMO1	12129	1	270	534	474	430	44	270	-450	720
OBSDEMO1	124	1	208	677	617	615	2	333	268	65
OBSDEMO1	12550	1	241	495	435	505	-70	315		-74
OBSDEMO1	12755	1	323	760	700	545	155	368	328	40
OBSDEMO1	131	1	388	611	551	N/A	N/A	433	N/A	N/A
OBSDEMO1	132	1	252	382	322	355	-33	252	285	-33
OBSDEMO1	133	1	266	392	332	430	-98	266	240	26

5.3 Summary Screens

Summary screens combine single screens to bring information together in logical groups. Additionally they summarise figures across a group (warehouse, shift, owner) is order to provide an overview of progress within the operations.

For example:

- System and Warehouse Overview - This shows a panel of the current outstanding tasks available for users to complete, and a panel showing the tasks already completed by users on the current day.
- Current Productivity - This shows panels of 4 general tasks in the warehouse, showing the performance of employees in this area, versus the target productivity rates.

5.3.1 TMS Screens

- Trip Summary - Showing all the hours on the schedule, and the number of trips on each
- Trip Overview - A summary of all the trips from the depot.
- Orders Summary - Detailed information on the Orders within a depot.

Trip Summary

Depot: OBSDEMO2 Schedule: 090327 Go

Date/Hour	Planned Trips	Actual Trips	Difference
26/03/2009 05:00:00	0	1	1
26/03/2009 06:00:00	0	2	2
26/03/2009 07:00:00	0	2	2
26/03/2009 08:00:00	0	2	2
26/03/2009 09:00:00	0	2	2
26/03/2009 10:00:00	0	2	2
26/03/2009 11:00:00	1	2	1
26/03/2009 12:00:00	1	2	1
26/03/2009 13:00:00	1	2	1
26/03/2009 14:00:00	1	3	2

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System Overview - Trips

Depot: OBSDEMO1 　 Schedule: 090327 　 Go

Total Trips	131	
# Planned	0	0.00%
# Tendered	0	0.00%
# Accepted	1	0.76%
# En-route	118	90.08%
# Completed	0	0.00%
# Confirmed	12	9.16%
# with Driver	126	96.18%
# without Driver	5	3.82%
# with Vehicle	125	95.42%
# without Vehicle	6	4.58%
# with Trailer	124	94.66%
# without Trailer	7	5.34%
Total RPE on Departure	3,093	.
Total Volume on Departure	3,093	.
Total Weight on Departure	1,570,370	.

System Overview - Orders

Schedule: 090327 　 Customer: HARIBO 　 Go

Group	EXELBAWT	EXELBAWT	OBSDEMO1	OBSDEMO1
From	EXELBAWT	EXELBAWT	OBSDEMO1	OBSDEMO1
From Name	Bawtry Exel Bawtry_DN11 9HE	Bawtry Exel Bawtry_DN11 9HE	Demo Site_OBS Demo Site_DN11 9HE	Demo Site_OBS Demo Site_DN11 9HE
To	EXELBAWT	HARIHOLL	HARIHOLL	OBSDEMO1
To Name	Bawtry Exel Bawtry_DN11 9HE	Holland Haribo_HL	Holland Haribo_HL	Demo Site_OBS Demo Site_DN11 9HE
Orders Total	1	1	1	1
Orders Unplanned	1 / 100.00%	1 / 100.00%	1 / 100.00%	1 / 100.00%
Orders Planned	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%
Orders Delivered	0 / 0.00%	0 / 0.00%	0 / 0.00%	0 / 0.00%
RPE Total	15.00	33.00	33.00	15.00
RPE Unplanned	15.00 / 100.00%	33.00 / 100.00%	33.00 / 100.00%	15.00 / 100.00%
RPE Planned	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%
RPE Delivered	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%
Weight Total	9,982.00	10,528.00	10,528.00	9,982.00
Weight Unplanned	9,982.00 / 100.00%	10,520.00 / 100.00%	10,528.00 / 100.00%	9,982.00 / 100.00%
Weight Planned	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%
Weight Delivered	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%
Volume Total	15.00	33.00	33.00	15.00
Volume Unplanned	15.00 / 100.00%	33.00 / 100.00%	33.00 / 100.00%	15.00 / 100.00%
Volume Planned	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%
Volume Delivered	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%	0.00 / 0.00%
Total Order Revenue	£120.73	N/A	N/A	£120.73

5.4 Extended Extracts

Calidus Vision extracts and analyses all common task types (for example Picking, Receipt, Stock Take, Putaway, Replen). Some operations require that these task types be broken down further (for example, low and high part picking, picking from chill areas only). Extended Extractions are screens that show this detailed information in the way that the operation wants.

💡 **Note:** Due to the bespoke nature of the breakdown (i.e. very site specific), this is not something that can be demonstrated and is not configured within the generic system.

5.5 Analysis & Enquiries

These screens allow you to view and extract detailed information over a time period.

For Example:

- Detail Enquiry - this shows all the historical productivity data.

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All Task Types for All Days

Change Enquiry Selection | Export to CSV

Show 20 ▼ entries   Search: [_____]

Employee	Date	Task Type	Time	Tasks	Cases & Units	Cases/Hour
JSA - JS Anderson	2009/07/20	Part-pallet Picks	00:02:25	3	112/112	2,780.69
OB - O Brown	2009/07/20	Part-pallet Picks	00:02:33	3	84/84	1,747.98
HF - H Fox	2009/07/20	Part-pallet Picks	01:06:39	26	677/677	609.45
TA - T Anderson	2009/07/21	Part-pallet Picks	00:16:49	8	164/164	585.13
OB - O Brown	2009/07/21	Part-pallet Picks	00:17:59	5	126/126	420.39
TO - T OMalley	2009/07/20	Part-pallet Picks	00:02:31	1	10/10	238.41
AS1 - AS 1	2009/07/22	Part-pallet Picks	00:13:50	22	37/37	160.48
MR1 - MR 1	2009/07/21	Part-pallet Picks	00:10:41	1	28/28	157.25
NC1 - NC 1	2009/07/21	Part-pallet Picks	02:30:37	191	351/351	139.83
BF - B Fox	2009/07/22	Part-pallet Picks	00:17:20	25	36/36	124.62
MG3 - MG 3	2009/07/22	Part-pallet Picks	00:06:24	9	13/13	121.88
WT1 - WT 1	2009/07/21	Part-pallet Picks	04:20:43	340	511/511	117.60
AR - A Riley	2009/07/19	Part-pallet Picks	00:46:36	88	91/91	117.17
ED2 - ED 2	2009/07/22	Part-pallet Picks	00:14:51	27	29/29	117.17
AR - A Riley	2009/07/21	Part-pallet Picks	03:12:24	312	374/374	116.63
NB - N Brown	2009/07/19	Part-pallet Picks	00:59:48	94	115/115	115.38
JS1 - JS 1	2009/07/22	Part-pallet Picks	00:17:52	16	34/34	114.18
DP - D Parkins	2009/07/22	Part-pallet Picks	01:56:44	147	222/222	114.11
PK1 - PK 1	2009/07/22	Part-pallet Picks	00:13:11	11	25/25	113.76
MB7 - MB 7	2009/07/22	Part-pallet Picks	04:01:51	294	487/457	113.38
TOTALS				**74,136**	**80,696/0**	

Showing 1 to 20 of 652 entries   First Previous [1] 2 3 4 5 … 33 Next Last

You can query data through the fields offered.

You can Filter data once found.

You can sort the data.

You can Export the data to CSV or formatted output.

- Orders - Time To Completion - This shows the estimated amount of time required to complete the currently-available part picks in the operation.

Part-picks - Estimated Time to Completion		
Part pick tasks and Productivity rates		
	Qty	Cases
Part-Pallet Picks	3,450	7,323
Part-pallet Picks Rate	58.70	88.04
Connected Users by Activity		
Activity	Users	
Pick	45	
Estimated Time to Completion		
Part-pallet Picks ETA	2.03	

5.6 Finding Screens Quickly

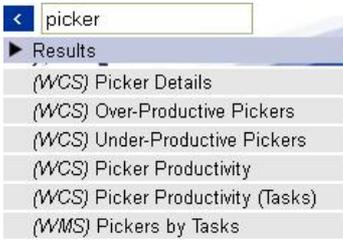Note that this screen is one of the ones configured on this user's Quick Menu.

This can be configured through the User Settings screen.

Click on the User Quick Screens button and change the screens to be displayed (through the filter), the sequence, and save.

This methodology of sequencing screens is used throughout the system.

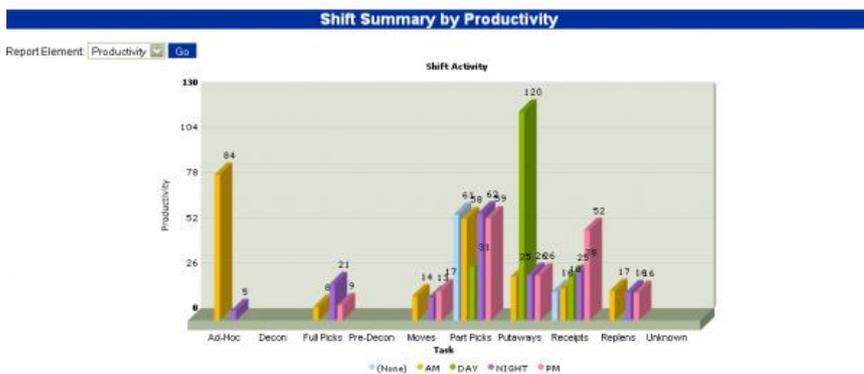You can also access screens through a Search function on a pop-up toolbar.

< | System Help | Help on this screen | Print... | Search...

< | [_____]

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Click the '>' button in the top left to show the pop-up toolbar options. Click Search and enter 'Status'. Click on Order Status 2.

5.7 Graphs

Graphs plot the data from the screens we have already seen (mostly the Summary screens) to provide a quick visible comparison of data. 🔴 **Warning**: Your Browser must have Flash installed to display the Graphs.
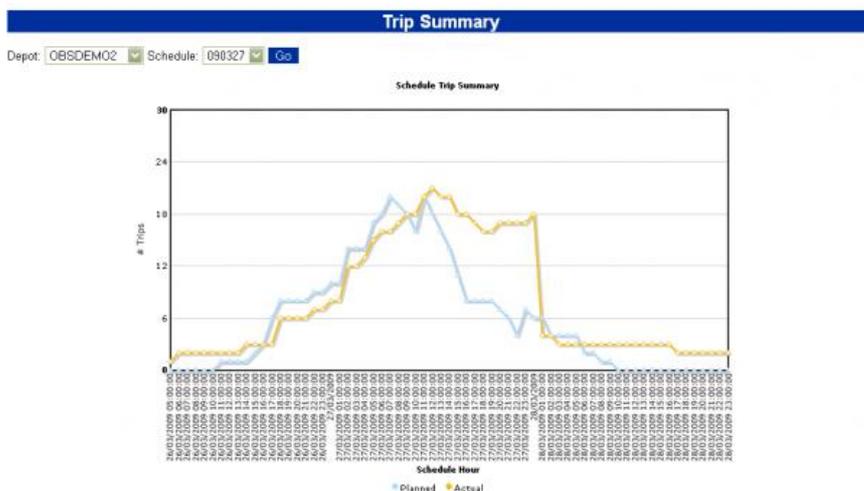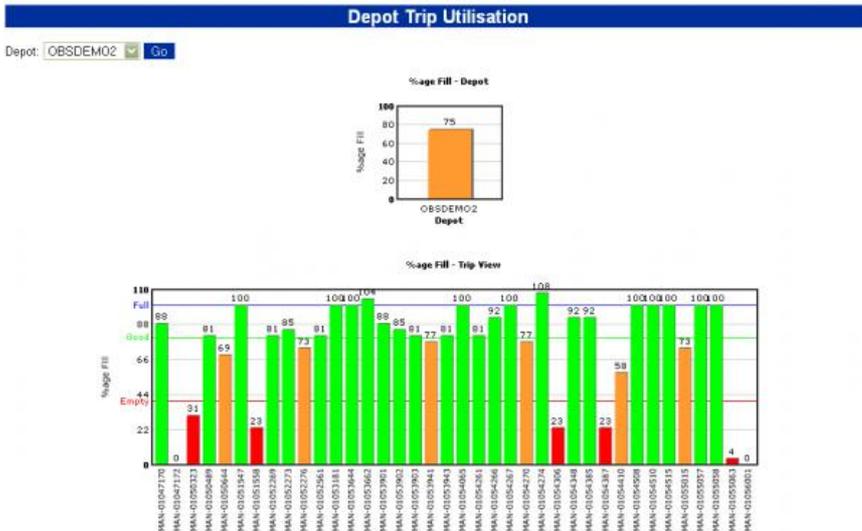
For example:

- Shift Summary screen - this shows a comparison of the average productivity of all shifts in the operation, over all task types. Note that you can click on the data bars and you will be shown the data used to calculate the information shown.

5.7.1 TMS Graphs

- Trip Overview - A pie chart showing the different statuses of trips in the depot.
- Trip Summary - A comparison on Planned versus Actual times for all trips on a schedule, per hour.
- Percentage Fill Hauliers/Trips - Bar graphs of the percentage fill for summarised per Depot, Haulier and Trip. RAG-coloured for easy planning.

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5.8 Monitor

The Monitor screens show views of system-specific activities that require regular monitoring.

For example:

- Order Status/Order Status 2 - This provides a view of the orders being processed in the operation, from some days in the past to future requirements. The detail can be further enquired by clicking on a figure - you will then be shown the detailed information relating to orders at that status.

5.8.1 TMS Monitor

- Arrivals Departures

5.9 Settings

In these screens you will be able to configure the way that the system operates:

- Web - Here you can change the Look and Feel. For example, change the style to a different one, then reload the application using the button provided. There are many styles available, and more can be created (perhaps for a customer view).
- Productivity - Here you can maintain the Minimum and Target productivity levels, which directly affects the RAG colouration in the screens and extracts. 💡 **Note:** the system is multi-warehouse and multi-owner, allowing for a central installation.
- Run - Here you can maintain the screens for a simple Dashboard. Screens can be added and removed, and the dashboards can be set to run on this terminal through the Actions/Timed Display menu option.

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>>>>>>>>

- There are also a range of System specific settings.

5.9.1 TMS Settings

You can enter the target PEV here.

5.10 Admin

The Admin screens allow changes of settings that affect how Vision runs. These are very restricted options (with a high security level) and should only be given to a select few supervisors. Examples:

- User Maintenance - Here you can add new users for the system and select what items they have available.
- Groups & Menu Maintenance - Here you can add and remove screens, and create new menu groups to apply to users (to restrict the screens available).
- Rules Maintenance - Here you can change settings on the system (for example, the RAG colours used, formats used for time and productivity fields and parameters for certain screens).

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