

Aptean

Calidus Terminal Container Management User Guide

Calidus TCM - 2.0

18/07/2025 - 4.00
Reference: USER GUIDE

Contents

1 Introduction.....	1
2 System Configuration.....	2
2.1 Owner Rules.....	2
2.2 Users.....	2
3 System Access.....	4
4 General.....	5
4.1 Screen Layout.....	5
4.2 Data Filtering.....	6
4.3 Data Sorting.....	6
4.4 Data Export.....	7
4.5 Container List.....	7
4.6 Job Header.....	8
4.7 Task/Movement List.....	8
5 Admin Screen Functionality.....	10
5.1 Gatehouse.....	10
5.2 Inbound Vessel.....	12
5.3 Outbound Vessel.....	13
5.4 Inbound Road.....	15
5.5 Outbound Road.....	17
5.6 Location Administration.....	18
5.7 Container Task Maintenance.....	19
5.8 Location Enquiry.....	21
5.9 Task Audit Enquiry.....	22
5.10 Container Volumes Report.....	23
5.11 Container Maintenance.....	23
5.12 Container Type Maintenance.....	25
5.13 Location Maintenance.....	26
5.14 Container Enquiry.....	27
6 PDA Functionality.....	29
6.1 PDA Login.....	29
6.2 PDA Menu.....	29
6.3 PDA Work in Progress.....	29
6.4 PDA Relocate Container.....	33
6.5 PDA Change Container Status.....	34
6.6 PDA Container Search.....	34
7 Appendix A Document History.....	36

1 Introduction

This document is designed to be a basic system user guide for Terminal Container Management functionality.

The Terminal Container Management system enables the tracking of container movements in, around, and out of a container storage facility.

The administration application provides tools for adding and tracking movements, whilst the PDA application provides tools to complete the movements.

Note that this document contains reference to multiple seals and hazardous type maintenance changes forthcoming to the system.

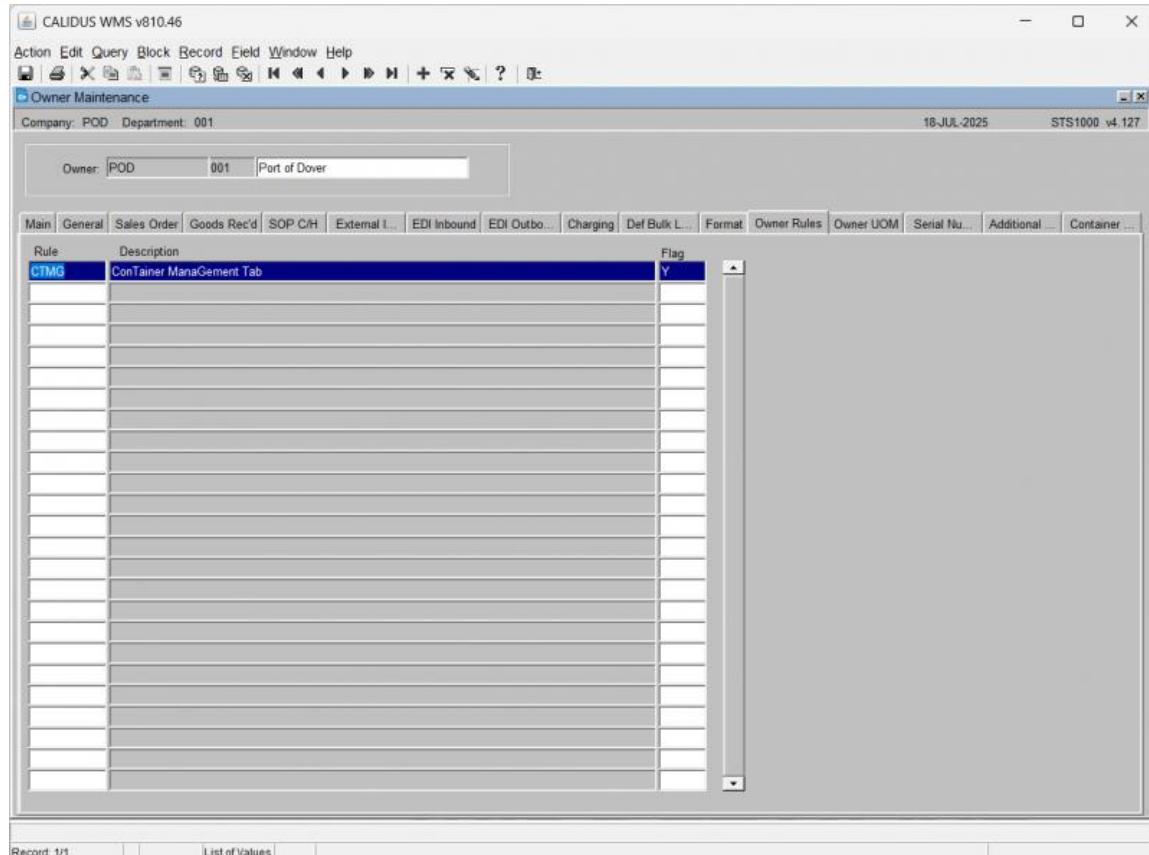


2 System Configuration

TCM is configured with Calidus WMS.

2.1 Owner Rules

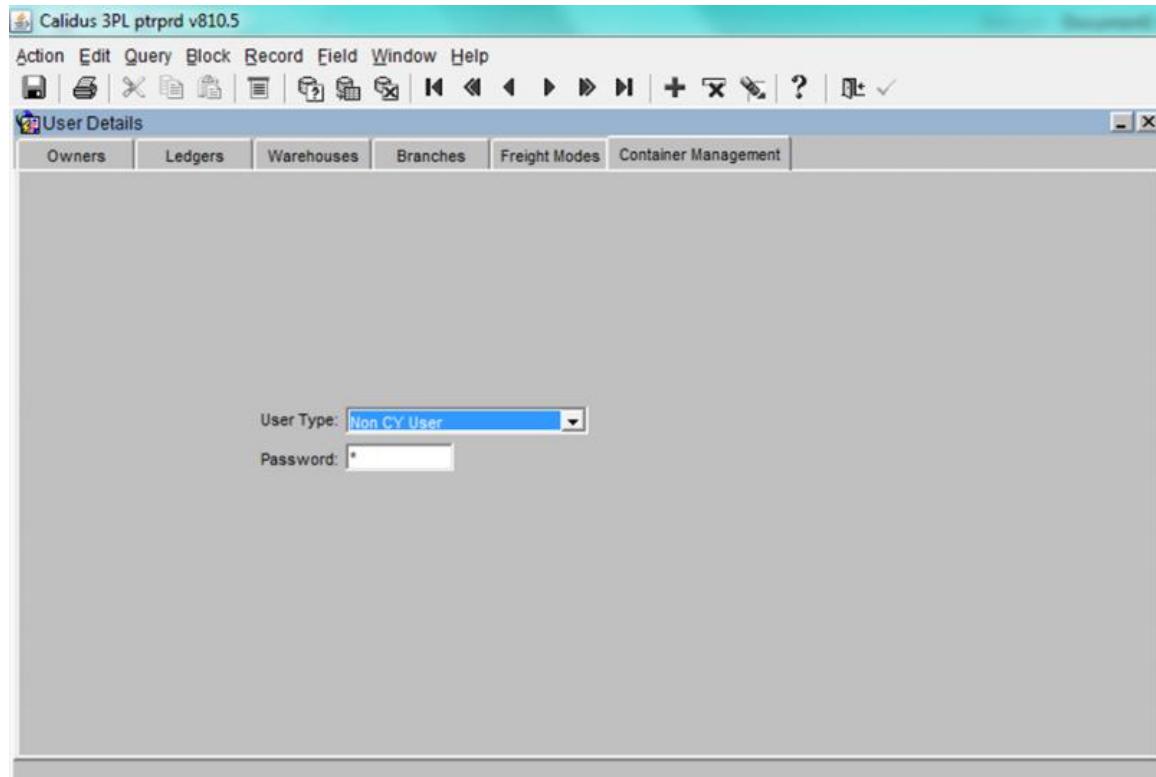
Note that the Owner under which you are configuring the user must be configured for Container Yard Management, through Owner Rules (CTMG). This is set up in the Owner Maintenance screen STS1000.



2.2 Users

Users are setup via the WMS system via the ?Container Management? Tab within the WMS user maintenance screen, [EXMUSER](#).





Note that the Owner under which you are configuring the user must be configured for Container Yard Management, through Owner Rules (CTMG).

Users are of a specific type

- Non Container management user (no access at all)
- Admin (access to all container management functions)
- PDA (access to device screens only)
- Customer (access to customer screens only)



3 System Access

Select the application from the appropriate folder to launch the system to display the Logon page.

You can choose the type of login here using the link to the right of the **Log In** button:

- *User Login* - access to the TCM Admin console.
- *PDA Login* - access to the mobile application. See section [PDA Login](#) for more information.

Depending on the last type of login page visited this will either be the PDA login or the Admin login

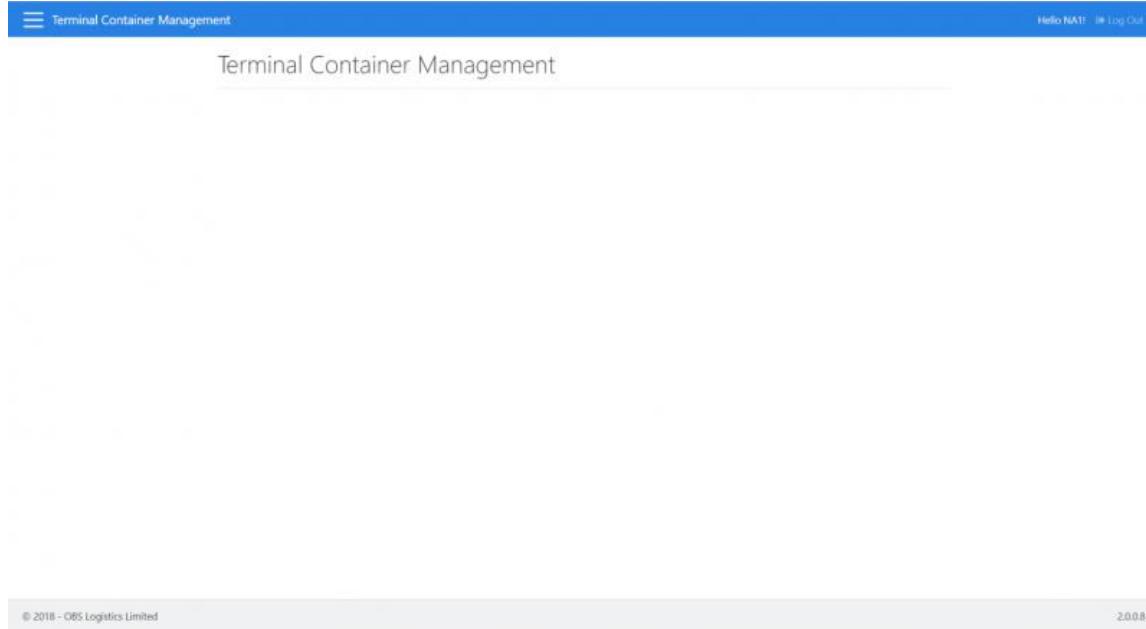
For Admin login, you enter the *User Name* here, then input your *Password*.

When you click the **Log In** button, you will be taken to the Admin home screen with the Main Menu - see here: [Main Menu](#).



4 General

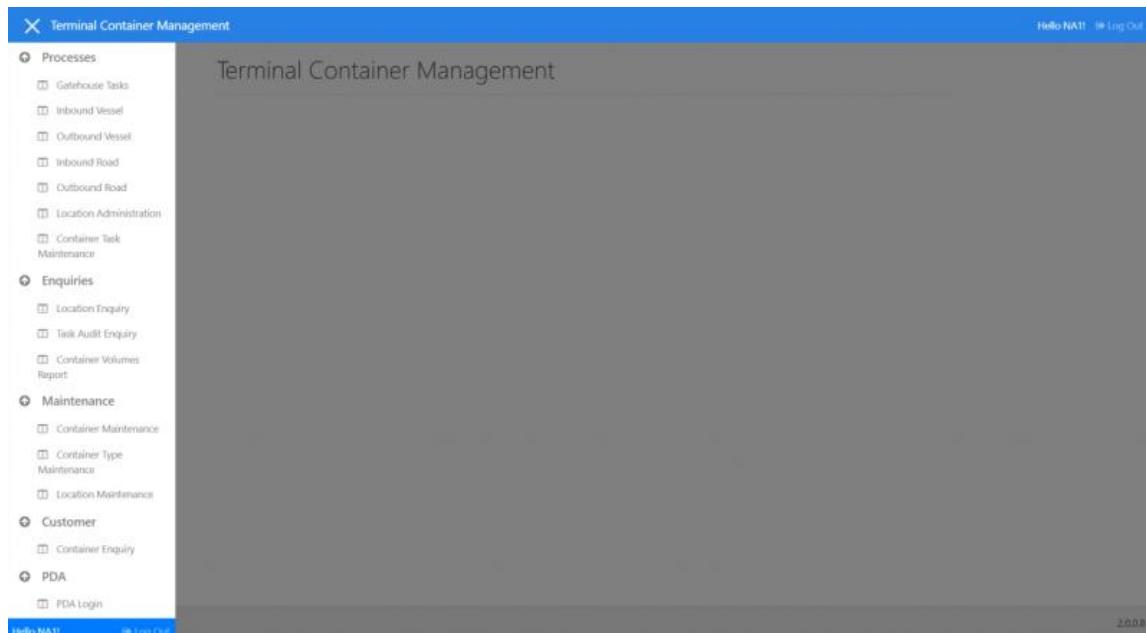
4.1 Screen Layout



4.1.1 Log Out

Logs the user out

4.1.2 Main Menu



Access to system functions is provided through the main menu.

The Container Yard Admin screens all have the same options as the home screen, seen on first login:

- Menu (upper left) - this pop-out allows access to all the screens, dependent on the login type. There is also a Log Out button on this menu.
- Log Out (Top Right) - log out of the system and return to the login screen.
- Footer - shows the system version.



4.2 Data Filtering

In various screens, data can be retrieved using filter fields

Container Task Maintenance

Date From	01/01/1950	Date To	31/12/2049
Account	NEXT1: Next Branch 1 - 1011 shirts	Movement Type	--Select Movement Type--
Reference	Booking Reference		
Show Completed Tasks	<input type="checkbox"/> <div style="display: flex; justify-content: space-around; width: 100%;"> Search Reset </div>		

Task Audit Enquiry

Date From	20/11/2018	Date To	21/11/2018
Location			
Container ID			
<input type="button" value="OK"/>			

4.2.1 Filter Fields

Various filter fields are available to narrow down container, container move and location selections. On some screens there are autocomplete functionality on certain filter fields.

- *Date / Date Range* - Filter data by a date or date range.
- *Account* - Users can select a specific customer account to filter data by
- *Movement Type* - The type of transaction to filter by. E.g. Inbound Rail, Outbound Gate.
- *Registration* - The vehicle registration or voyage reference
- *Location* - A location in the yard. E.g. BAY001, TRAIN001
- *Container ID* - A specific container ID to filter data by.
- *Complete Tasks* - Determines if complete tasks should be included in search results.

4.2.2 Filter Buttons

- **Reset** - This will clear all field entries.
- **Search** - This will display the results of the filter entered.

4.3 Data Sorting

Data is displayed in tabular format in various screens. Some screens allow for the sorting of data by clicking on the column headings.



Onsite Date	Account Id	Account Name	Container Id	Type Description	Weight	Seal
11/09/2018 13:04:46	NEXT1	Next Branch 1 - 1011 shirts	123124123	40GP-G-General purpose good	0	
	NEXT1	Next Branch 1 - 1011 shirts	1234	200TG-20 Ft Open top good	0	
11/09/2018 13:04:03	NEXT1	Next Branch 1 - 1011 shirts	123412	40HCG-High cube good	0	
11/09/2018 13:05:05	NEXT1	Next Branch 1 - 1011 shirts	124123	20ft (6.06m)	0	
	OBS	OBS Logistics	16161616167	200TG-20 Ft Open top good	0	

Showing 1 to 1,035 of 1,035 entries

4.4 Data Export

Data is displayed in tabular format in various screens. Some screens allow for the exporting of data to *Excel*, *CSV* or *PDF* where the **Export** icons appears

Onsite Date	Account Id	Account Name	Container Id	Type Description	Weight	Seal
11/09/2018 13:04:46	NEXT1	Next Branch 1 - 1011 shirts	123124123	40GP-G-General purpose good	0	

4.5 Container List

The Container List displays container details in a tabular format. A *Search* filter field can be used to filter through all records displayed in the table.

Onsite Date	Account Id	Account Name	Container Id	Type Description	Weight	Seal
11/09/2018 13:04:46	NEXT1	Next Branch 1 - 1011 shirts	123124123	40GP-G-General purpose good	0	
	NEXT1	Next Branch 1 - 1011 shirts	1234	200TG-20 Ft Open top good	0	
11/09/2018 13:04:03	NEXT1	Next Branch 1 - 1011 shirts	123412	40HCG-High cube good	0	
11/09/2018 13:05:05	NEXT1	Next Branch 1 - 1011 shirts	124123	20ft (6.06m)	0	
	OBS	OBS Logistics	16161616167	200TG-20 Ft Open top good	0	

Showing 1 to 1,035 of 1,035 entries

4.5.1 Selecting a Container

Clicking on the container row will enter an edit container details mode.

4.5.2 Columns

A number of different columns are displayed. Not all columns are displayed on all screens as it depends on the functionality of the screen in question. Clicking on a column heading will sort the table by the data contained within the column.

- **Onsite Date** - Date and time the container arrived on site
- **Account ID / Account Name** - The client account id and name.
- **Container ID** - The ID of the container
- **Container Type** - The type of container. E.g. 20ft container.
- **Weight** - Weight of the stock in the container (if any). This is not a required field in some cases and is defaulted to 0.
- **Seal** - Seal of the container. This is not a required field in some cases and is defaulted to blank.



4.6 Job Header

The Task Header is shown on various screens and allows the definition on container yard tasks.

The form consists of several input fields and dropdowns. At the top left are buttons for 'New' and 'Search'. Below these are fields for 'Date' (20/11/2018), 'Time' (12:21), 'Registration' (empty), 'Account' (NEXT1; Next Branch 1 - 1011 shirts), and 'Haulier' (empty). At the bottom is a large blue 'OK' button.

4.6.1 Job Header Fields

Date/Time - Date and time. For Vessel based tasks this relates to the due date. For Gate and Road based tasks this relates to the time that a lorry arrives at the gate. For gate based tasks these fields are defaulted to the current date and time.

- **Registration** - The registration of the vehicle at the gate.
- **Voyage Reference** (Vessel Tasks Only) - A dropdown list of Voyage References
- **Linked Voyage Reference** (Outbound Vessel Tasks Only) - A dropdown list of Voyage References. This field represents a Linked Inbound Voyage.
- **Reference** (Road Tasks Only) - Job Reference that is used to identify the job on Work In Progress mode. This field is automatically generated depending on Haulier, date and time. This field can be manually edited.
- **Account** - The account that the order(s) relate to. E.g. MED01
- **Haulier** (Gate and Road) - The Haulier used. Only available for entry for Gate based tasks
- **Carrier** - The carrier used. Only available for Vessel based tasks .
- **Service** - The service used. Only available for Vessel based tasks.

4.6.2 Job Header Buttons

Action (OK) - The action button will initiate the next step in whatever process is being performed in the screen being used if all fields are valid.

4.7 Task/Movement List

The task/movement list is used to display outstanding tasks or completed tasks / container movements

Movement Date	Movement Type	Location	To Location	Account Name	Order #	Reference	Booking Reference	Haulier Code	Container Id	Type	Status	Hazardous	UN No.	Weight (kg)	Seal	Position	Movement By
20/11/2018 10:24:15	Outbound Gate	PREP023		Next Branch 1 - 1011 shirts	1	Y195KOI		0BS	TRLU4264746	Test 4	Empty				0	RH1	
20/11/2018 10:23:48	Outbound Gate	DAMAGES001		Next Branch 1 - 1011 shirts	1	Y195KOI		0BS	MTBU2023632	Test 3	Full/Damaged	*	1839		0	RH1	
20/11/2018 10:23:32	Inbound Gate	REFRIG001		Next Branch 1 - 1011 shirts	1	Y195KOI		0BS	TEXU4777889	Test 1	Full	*	0173	14677	H-65784	0	RH1
20/11/2018 10:23:14	Inbound Gate	PREP041		Next Branch 1 - 1011 shirts	1	Y195KOI		0BS	GVCU5144369	Test 2	Full				0	RH1	

4.7.1 Columns

A number of different columns are displayed. Not all columns are displayed on all screens as it depends on the functionality of the screen in question. Clicking on a column heading will sort the table by the data contained within the column.

- **Date/Time** - The date/time relating to the task or movement
- **Movement Type** - The type of movement/Task - e.g. Inbound Gate, Outbound Vessel etc
- **Location** - The location the container was removed from / deposited into
- **To Location** - The location the container is scheduled to be deposited into



- *Account Name* - The account name associated with the task
- *Order #* - The order number associated with the task
- *Reference* - Job Reference that is associated with the task
- *Booking Reference* - Reference from Bay Diary
- *Haulier* - The haulier associated with the tasks
- *Container ID* - The container to be moved, taken out of or deposited into the yard
- *Type* - The type of container
- *Container Status* - The status of the container
- *Hazardous* - Indicates if the container contains a hazardous substance or material
- *UN #* - If the container is flagged as hazardous, this will show the relevant UN number
- *Weight* - Weight of the container
- *Seal* - Seal of the container



5 Admin Screen Functionality

5.1 Gatehouse

This screen is used to enter a new task, a combination of Inbound and/or outbound gate tasks.

The screenshot shows the 'Gatehouse Tasks' screen. At the top, there are search fields for Date (20/11/2018), Time (14:10), Registration (OBS1234), Account (OBS OBS Logistics), and Haulier (OBS). Below these are 'Inbound' and 'Outbound' sections. Each section has a table with columns: Order #, Container ID, Type, Status, Hazardous, UN No., Seal, and Weight (kg). The 'Inbound' section has two rows, and the 'Outbound' section has one row. Both sections show a 'Done' button at the bottom.

This screen allows the user at the gate to:

- Define details of inbound gate tasks (maximum of 2)
- Define details of outbound gate tasks (maximum of 2)
- Search for confirmed, unconfirmed or all gatehouse tasks related to a job.
- Amend existing unconfirmed gate tasks
- Confirm details of existing gatehouse tasks so that they can be actioned by drivers

Once the details have been entered, saved and confirmed, the tasks are created and are immediately available for drivers to action.

5.1.1 Header Fields

The following fields are prompted for before entry of task details can begin:

- *Date* - Date Selector. Defaulted to the current date. Required Entry.
- *Time* - Time Selector. Defaulted to the current time. Required Entry.
- *Registration* - Textbox. The vehicle registration; Required Entry.
- *Account* - Drop-down List. Defaulted to the user's default account. Required Entry.
- *Haulier* - Auto-complete. If the Haulier does not exist, it will be automatically added when saving the data. Required Entry.

5.1.2 Inbound Fields

These will be displayed in a grid. There can be up to 2 containers entered here.

- *Order #* - Textbox. This is not validated by the system. Required Entry.
- *Container ID* - Textbox. Required Entry; Validated to the standard Container pattern with Mod 11 Check Digit calculation. Entered containers cannot already be in the terminal. Entered containers cannot already exist on an outstanding task.
- *Type* - Drop-down List; Defaulted if the Container ID has already been known in the system.
- *Status* - Drop-down List; Container Status. Values from E/F/ED/FD. Defaulted if the Container ID has already been known in the system.
- *Hazardous* - Checkbox; Defaults to unchecked. Defaulted if the Container ID has already been known in the system.
- *UN No* - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS system; Entered and required entry only if the Container is marked as Hazardous. Defaulted if the Container ID has already been known in the system.



- **Weight** - Textbox. A weight in Kilogrammes. Only displayed if the container is known to be planned Outbound on Vessel (or Export). Required Entry. Must be greater than zero and less than 999999.
- **Seal** - Textbox. Required Entry if the container is known to be planned Outbound on Vessel (or Export).

Note: *Seals* are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to prompt for up to 3 seals per container.

Note: *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to allow a drop-down list of all Hazardous Types defined in the WMS.

If an item in the grid is clicked, the user is allowed to edit it (if the task is unconfirmed).

Export buttons are available to export the rows of this table to CSV, Excel and PDF formats, so the user can print these details if required.

5.1.3 Outbound Fields

These will be displayed in a grid. There can be up to 2 containers entered here.

- **Order #** - Textbox. This is not validated by the system. Required Entry.
- **Container ID** - Textbox. Required Entry; Validated to the standard Container pattern with Mod 11 Check Digit calculation. Entered containers must already exist in the system and be associated with the entered ?Account ID?. Entered containers must already be in the terminal. Entered containers cannot already exist on an outstanding task.
- **Type** - Drop-down List; Defaulted if the Container ID has already been known in the system.
- **Status** - Drop-down List; Container Status. Values from E/F/ED/FD. Defaulted if the Container ID has already been known in the system.
- **Hazardous** - Checkbox; Defaults to unchecked. Defaulted if the Container ID has already been known in the system.
- **UN No** - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS system; Entered and required entry only if the Container is marked as Hazardous. Defaulted if the Container ID has already been known in the system.
- **Seal** - Textbox. Optional Entry

Note: *Seals* are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to prompt for up to 3 seals per container.

Note: *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to allow a drop-down list of all Hazardous Types defined in the WMS.

Outbound task entry allows anonymous containers to be specified (exact container to be chosen during task execution). To do this the user simply enters a reference beginning with EMPTY in the *container id* field and selects the required *Type* and *Container status*.

Export buttons are available to export the rows of this table to CSV, Excel and PDF formats, so the user can print these details if required.

5.1.4 Task Creation

As data is entered it is saved by either clicking the appropriate button, pressing **ENTER** or **TABbing** onto the next row.

On saving the entry the data will be validated and the user prompted to confirm the entry or correct problems. If everything passes validation, the system will:

- Create records on the Task table at unconfirmed status.
- Create Containers if they were previously unknown.
- Update Containers if they were previously known.
- Create a Haulier if it was previously unknown.

Once entry has been completed a **Confirm** button is present to send tasks out for execution. Tasks can be amended at any point prior to confirmation.



5.1.5 Task Amendments

A Search tab is available for users to search by *Registration* (auto-complete) for a saved Inbound Gate task, choosing whether to look for confirmed, un-confirmed or all details (defaulted to un-confirmed). Un-confirmed tasks can be amended as required.

5.2 Inbound Vessel

The inbound vessel screen allows the user to set up the pre-advice of tasks arriving by ship. If these tasks have already been pre-created in the WMS as goods receipts this screen will display that data.

This screen allows users to:

- Define details of new inbound vessel tasks (unlimited)
- Search for confirmed, unconfirmed or all inbound vessel tasks related to a voyage
- Amend existing unconfirmed inbound vessel tasks
- Confirm details of existing inbound vessel tasks so that they can be actioned by drivers

Once the details have been entered, saved and confirmed, the tasks are created and are immediately available for drivers to action.

5.2.1 Header Fields

On entry to the screen, the system will prompt for the following data.

- *Account* - Drop-down List; defaulted to the user's default account
- *Due Date* - Date Selector; Validated as a date; not defaulted.
- *Due Time* - Time Selector; Validated as a time; not defaulted.
- *Voyage Reference* - Drop-down List; Current voyages looked up from the VOYAGES table - Required.
- *Service* - Textbox; Optional free text entry field.
- *Carrier* - Textbox; Optional free text entry field.

5.2.2 Task Fields

These will be displayed in a grid. There is no limit to the number of records that can be entered. Entering a row of data will automatically show the data above and extend the grid by another line.

- *Order #* - Textbox. This is not validated by the system. Required Entry.
- *Container ID* - lookup on Planned WMS Containers. Required Entry; Validated to the standard Container pattern with Mod 11 Check Digit calculation. Entered containers cannot already be in the terminal. Entered containers cannot already exist on an outstanding task.
- *Type* - Drop-down List; Defaulted if the Container ID has already been known in the system.



- **Status** - Drop-down List; Container Status. Values from Empty/Full/Empty (Damaged)/Full (Damaged). Defaulted if the Container ID has already been known in the system.
- **Hazardous** - Checkbox; Defaults to unchecked. Defaulted if the Container ID has already been known in the system.
- **UN No** - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS tables; Entered only if the Container is marked as Hazardous. Defaulted if the Container ID has already been known in the system.
- **Seal** - Textbox. Optional entry.
- **Weight** - Textbox (Numeric Only). Optional Entry.

 **Note:** *Seals* are subject to internal confirmation of the business case and the raising of a new change request with Apteon. When confirmed, this is expected to prompt for up to 3 seals per container.

 **Note:** *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Apteon. When confirmed, this is expected to allow a drop-down list of all Hazardous Types defined in the WMS.

If an item in the grid is clicked, the user is allowed to edit it (if the task is un-confirmed).

Export buttons are available to export the rows of this table to CSV, Excel and PDF formats, so the user can print these details if required.

5.2.3 Task Creation

As data is entered it is saved by either clicking the appropriate button, pressing **ENTER** or **TABbing** onto the next row.

On saving the entry the data will be validated and the user prompted to confirm the entry or correct problems. If everything passes validation, the system will:

- Create records on the Task table at unconfirmed status.
- Create Containers if they were previously unknown.
- Amend Containers if they were previously known.

Once entry has been completed a **Confirm** button is present to send tasks out for execution. Tasks can be amended at any point prior to confirmation.

5.2.4 Task Amendments

A **Search** tab is available for users to search by *Voyage Reference* (auto-complete) for a saved Inbound Vessel Advice, choosing whether to look for confirmed, unconfirmed or all details (defaulted to un-confirmed). Un-confirmed tasks can be amended as required.

5.3 Outbound Vessel

This screen is extremely similar to the Inbound Vessel screen, except for:

- The user can optionally link an Outbound Vessel advice to an Inbound Vessel advice.
- The user will use the position field to indicate the order of loading the containers onto the vessel



This screen allows users to:

- Define details of new outbound vessel tasks (unlimited)
- Search for confirmed, unconfirmed or all outbound vessel tasks related to a voyage
- Amend existing unconfirmed outbound vessel tasks
- Confirm details of existing outbound vessel tasks so that they can be actioned by drivers

Once the details have been entered, saved and confirmed, the tasks are created and are immediately available for drivers to action.

5.3.1 Header Fields

On entry to the screen, the system will prompt for the following data.

- *Account* - Drop-down List; defaulted to the user's default account
- *Date* - Date Selector; Validated as a date; not defaulted.
- *Time* - Time Selector; Validated as a time; not defaulted.
- *Voyage Reference* - Drop-down List; Current voyages looked up from the VOYAGES table - Required.
- *Service* - Textbox; Optional free text entry field.
- *Carrier* - Textbox; Optional free text entry field.
- *Linked Voyage Reference* - Optional Entry; Drop-down List of unconfirmed inbound voyages on the same day up to day -3.

5.3.2 Task Fields

These will be displayed in a grid. There is no limit to the number of records that can be entered. Entering a row of data will automatically show the data above and extend the grid by another line.

- *Order #* - Textbox. This is not validated by the system. Required Entry.
- *Container ID* - Textbox. Required Entry; Validated to the standard Container pattern with Mod 11 Check Digit calculation. Entered containers must already exist in the system and be associated with the entered ?Account ID?. Entered containers must already be in the terminal. Entered containers cannot already exist on an outstanding task.
- *Type* - Drop-down List; Defaulted if the Container ID has already been known in the system.
- *Status* - Drop-down List; Container Status. Values from E/F/ED/FD. Defaulted if the Container ID has already been known in the system.
- *Hazardous* - Checkbox; Defaults to unchecked. Defaulted if the Container ID has already been known in the system.
- *UN No* - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS tables; Entered only if the Container is marked as Hazardous. Defaulted if the Container ID has already been known in the system.
- *Weight* - Textbox (Numeric Only). A weight in Kilogrammes. Required Entry. Must be greater than zero and less than 999999.
- *Position* - Textbox. A numeric position. Must be between 1 and 9999. Required Entry. Position must be unique for the registration (i.e. can't enter a position of 2 twice)
- *Seal* - Textbox. Optional entry



Export buttons are available to export the rows of this table to CSV, Excel and PDF formats, so the user can print these details if required.

Outbound task entry allows anonymous containers to be specified (exact container to be chosen during task execution). To do this the user simply enters a reference beginning with EMPTY in the *container id* field and selects the required *Type* and *Container status*.

5.3.3 Task Creation

As data is entered it is saved by either clicking the appropriate button, pressing **ENTER** or **TABbing** onto the next row.

On saving the entry the data will be validated and the user prompted to confirm the entry or correct problems. If everything passes validation, the system will:

- Create records on the Task table at unconfirmed status.
- Create Containers if they were previously unknown.

Once entry has been completed a **Confirm** button is present to send tasks out for execution. Tasks can be amended at any point prior to confirmation. Tasks may also be ?confirmed? via the Bay Diary system if the systems are linked for the purposes of executing full container picks.

5.3.4 Task Amendments

A **Search** tab is available for users to search by *Voyage Reference* (auto-complete) for a saved Outbound Vessel Advice, choosing whether to look for confirmed, unconfirmed or all details (defaulted to un-confirmed). Un-confirmed tasks can be amended as required.

5.4 Inbound Road

The inbound road screen allows the user to set up the pre-advice of tasks arriving through the road network.

This screen allows users to:

- Define details of new inbound road tasks (unlimited)
- Search for confirmed, unconfirmed or all inbound road tasks related to a job
- Amend existing unconfirmed inbound road tasks
- Confirm details of existing inbound road tasks so that they can be actioned by drivers

Once the details have been entered, saved and confirmed, the tasks are created and are immediately available for drivers to action.



5.4.1 Header Fields

On entry to the screen, the system will prompt for the following data.

- *Account* - Drop-down List; defaulted to the user's default account
- *Date* - Date Selector; Validated as a date; not defaulted.
- *Time* - Time Selector; Validated as a time; not defaulted.
- *Haulier* - Auto-complete. If the Haulier does not exist, it will be automatically added when saving the data. Required Entry.
- *Registration* - Will be generated from the Haulier. This can be overtyped with a registration or other reference as required.

5.4.2 Task Fields

These will be displayed in a grid. There is no limit to the number of records that can be entered. Entering a row of data will automatically show the data above and extend the grid by another line.

- *Order #* - Textbox. This is not validated by the system. Required Entry.
- *Container ID* - Textbox. Required Entry; Validated to the standard Container pattern with Mod 11 Check Digit calculation. Entered containers cannot already be in the terminal. Entered containers cannot already exist on an outstanding task.
- *Type* - Drop-down List; Defaulted if the Container ID has already been known in the system.
- *Status* - Drop-down List; Container Status. Values from Empty/Full/Empty (Damaged)/Full (Damaged). Defaulted if the Container ID has already been known in the system.
- *Hazardous* - Checkbox; Defaults to unchecked. Defaulted if the Container ID has already been known in the system.
- *UN No* - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS tables; Entered only if the Container is marked as Hazardous. Defaulted if the Container ID has already been known in the system.
- *Seal* - Textbox. Required Entry the container is known to be planned Outbound on Vessel (or Export).
- *Weight* - Textbox (numeric only). Only displayed if the container is known to be planned Outbound on Vessel (or Export). Required Entry.

 **Note:** Seals are subject to internal confirmation of the business case and the raising of a new change request with Apteon. When confirmed, this is expected to prompt for up to 3 seals per container.

 **Note:** Hazardous is subject to internal confirmation of the business case and the raising of a new change request with Apteon. When confirmed, this is expected to allow a drop-down list of all Hazardous Types defined in the WMS.

If an item in the grid is clicked, the user is allowed to edit it (if the task is unconfirmed).

Export buttons are available to export the rows of this table to CSV, Excel and PDF formats, so the user can print these details if required.

5.4.3 Task Creation

As data is entered it is saved by either clicking the appropriate button, pressing **ENTER** or **TABBING** onto the next row.

On saving the entry the data will be validated and the user prompted to confirm the entry or correct problems. If everything passes validation, the system will:

- Create records on the Task table at unconfirmed status.
- Create Containers if they were previously unknown.
- Update Containers if they were previously known.

Once entry has been completed a **Confirm** button is present to send tasks out for execution. Tasks can be amended at any point prior to confirmation.

5.4.4 Task Amendments

A **Search** tab is available for users to search by *Registration* (auto-complete) for a saved Inbound Road Advice, choosing whether to look for confirmed, unconfirmed or all details (defaulted to un-confirmed). Unconfirmed tasks can be amended as required.



5.5 Outbound Road

This screen is extremely similar to the Inbound Road screen, except for:

- Registration is defaulted to the same as Inbound but prefixed with an ?O? rather than an ?I?

This screen allows users to:

- Define details of new outbound road tasks (unlimited)
- Search for confirmed, unconfirmed or all outbound road tasks related to a job
- Amend existing unconfirmed outbound road tasks
- Confirm details of existing outbound road tasks so that they can be actioned by drivers

Once the details have been entered, saved and confirmed, the tasks are created and are immediately available for drivers to action.

5.5.1 Header Fields

On entry to the screen, the system will prompt for the following data.

- *Account* - Drop-down List; defaulted to the user's default account
- *Date* - Date Selector; Validated as a date; not defaulted.
- *Time* - Time Selector; Validated as a time; not defaulted.
- *Haulier* - Auto-complete. If the Haulier does not exist, it will be automatically added when saving the data. Required Entry. On entry of Haulier the *Registration* will auto-populate with a generated reference of {HAULIER CODE}{YYMMDDHHMM}.
- *Registration* - This can be overtyped with a registration or other reference as required.

5.5.2 Task Fields

These will be displayed in a grid. There is no limit to the number of records that can be entered. Entering a row of data will automatically show the data above and extend the grid by another line.

- *Quantity* - Textbox. Optional Entry. Read-only if *Container ID* entered.
- *Order #* - Textbox. This is not validated by the system. Required Entry.
- *Container ID* - Textbox. Required Entry if *Quantity* not entered; Read-only if *Quantity* entered. Validated to the standard Container pattern with Mod 11 Check Digit calculation. Entered containers must already exist in the system and be associated with the entered ?Account ID?. Entered containers must already be in the terminal. Entered containers cannot already exist on an outstanding task.
- *Type* - Drop-down List; Defaulted if the *Container ID* has already been known in the system.
- *Status* - Drop-down List; Container Status. Values from E/F/ED/FD. Defaulted if the *Container ID* has already been known in the system. If *Quantity* is entered then values should be restricted to E/ED
- *Hazardous* - Checkbox; Defaults to unchecked. Defaulted if the *Container ID* has already been known in the system. Read-only and unchecked if *Quantity* entered.



- **UN No** - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS tables; Entered only if the Container is marked as Hazardous. Defaulted if the *Container ID* has already been known in the system.

 **Note:** *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to allow a drop-down list of all Hazardous Types defined in the WMS.

If an item in the grid is clicked, the user is allowed to edit it (if the task is unconfirmed).

Outbound Road allows anonymous containers to be collected by the incoming vehicle. To do this the user simply enters a reference beginning with EMPTY in the *container id* field and selects the required *Type* and *Container status*.

To ensure easier entry of anonymous containers coming in via road, this screen will allow the user to enter a quantity of empty containers to collect. If this is the case then the user will not specify a container id but just the type of container and if it is Empty or Empty/Damaged.

Items are created at an ?unconfirmed? state and need to be confirmed for them to be made available for users to execute. This is done via the **Confirm** button.

If the bay diary system is integrated, the "**Confirm**" buttons for the tasks will not be shown. Tasks will be confirmed (and thus made ?live?) by the Bay Diary system separately.

Export buttons are available to export the rows of this table to CSV, Excel and PDF formats, so the user can print these details if required.

5.5.3 Task Creation

As data is entered it is saved by either clicking the appropriate button, pressing **ENTER** or **TABBING** onto the next row.

On saving the entry the data will be validated and the user prompted to confirm the entry or correct problems. If everything passes validation, the system will:

- Create records on the Task table at unconfirmed status.
- Amend Containers if they were previously known.

Once entry has been completed a **Confirm** button is present to send tasks out for execution. Tasks can be amended at any point prior to confirmation.

5.5.4 Task Amendments

A **Search** tab is available for users to search by *Registration* (auto-complete) for a saved Outbound Road Advice, choosing whether to look for confirmed, unconfirmed or all details (defaulted to un-confirmed). Unconfirmed tasks can be amended as required.

5.6 Location Administration

This screen allows the user to find a location and see all of the containers in FIFO sequence. The user will be able to change the sequence of containers in the location and save the results.



This screen allows users to:

- Alter the sequence of containers within a location
- Move containers from one location to another.

The user will also be able to select a second location and move containers into or out of that location by clicking buttons to move the top-most containers from one location to another.

5.7 Container Task Maintenance

This screen allows the user to select tasks and

- Edit the details
- Cancel/delete the task
- Complete the task manually

This screen allows users to:

- View details of outstanding and/or complete tasks
- Amend open task details
- Delete open tasks
- Complete open tasks



5.7.1 Search Functionality and Results

The screen allows users to find tasks using any or all of the following criteria:

- *Date or Date Range*
- *Account*
- *Type:*
 - ◆ *Inbound Gatehouse*
 - ◆ *Outbound Gatehouse*
 - ◆ *Inbound Road*
 - ◆ *Outbound Road*
 - ◆ *Inbound Vessel*
 - ◆ *Outbound Vessel*
 - ◆ *Move*
- *Registration*
- *Complete/Incomplete tasks*

The search results will be displayed in a grid showing the following details:

- *Date/Time*
- *Movement Type*
- *Task Status*
- *Account ID*
- *Account Name*
- *Order #*
- *Registration (Reference)*
- *Haulier*
- *Container ID*
- *Container Type*
- *Container Status*
- *Hazardous*
- *UN No*
- *Weight*
- *Position*

 **Note:** *Seals* are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to display up to 3 seals per container.

 **Note:** *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to display the *Hazardous Type*.

5.7.2 Task Actions

Each row in the results grid includes an **Action** column with **Edit**, **Delete**, and **Complete** buttons. These **buttons** are all visible for *incomplete* tasks. For *completed* tasks, these **buttons** are generally not visible, with one exception: for *Outbound Rail* tasks, the **Edit** button is available to allow amendment of the *Position*.

5.7.2.1 Edit Functionality

The **Edit** button will open a popup showing:

- All the task's details, allowing change of task details except for the *Container ID* and *Task Date/Time*.
- An **Update** button, to allow the user to save any changes to the details.
- A **Cancel** button to close the popup without saving any changes.

 **Note:** *Seals* are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to prompt for up to 3 seals per container.

 **Note:** *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to allow a drop-down list of all *Hazardous Types* defined in the WMS.



5.7.2.2 Delete Functionality

The **Delete** button will ask the user to confirm the request and, if confirmed, will remove the task.

5.7.2.3 Complete Functionality

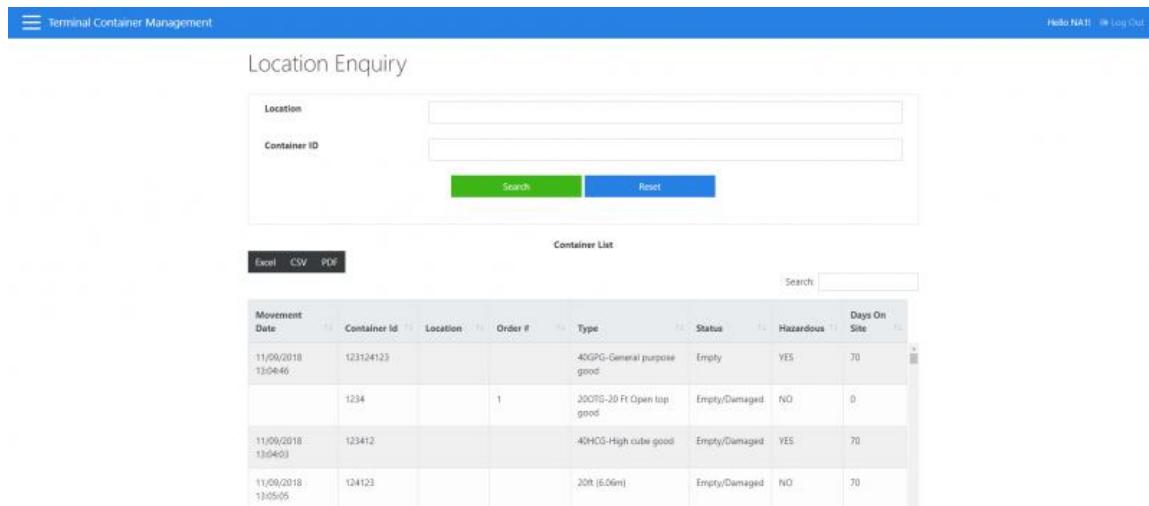
The **Complete** button will allow the user to complete the task. Depending on the task type, the system will prompt for a location in which to place the container (*Inbound*) or just confirm the outbound.

Saving any changes will mark the task as *complete* by the user performing the action. *Completed* tasks can be amended but only for *outbound rail* where the *position code* can be modified as required.

After doing of any of these actions, the search results grid will be refreshed.

5.8 Location Enquiry

This screen allows the user to view container information through the entry of Location or Container.



The screenshot shows the 'Location Enquiry' screen. At the top, there are two input fields: 'Location' and 'Container ID', each with a text input box and a 'Search' button. Below these are three export options: 'Excel', 'CSV', and 'PDF'. The main area is a 'Container List' grid with the following columns: Movement Date, Container ID, Location, Order #, Type, Status, Hazardous, and Days On Site. The grid contains four data rows:

Movement Date	Container ID	Location	Order #	Type	Status	Hazardous	Days On Site
11/09/2018 13:04:46	123124123			40GP/General purpose good	Empty	YES	70
	1234		1	200TGS-20 Ft Open top good	Empty/Damaged	NO	0
11/09/2018 13:04:03	123412			40HCG-High cube good	Empty/Damaged	YES	70
11/09/2018 13:05:05	124123			20ft (8.06m)	Empty/Damaged	NO	70

This screen allows users to:

- Enquire on containers held within a specific location (or all locations)
- Enquire on specific containers
- Further drill down into the container details to see the movement history/associated signatures for the selected container

Understood. I've updated the text to ensure the word "buttons" is no longer bolded, only the names of the specific buttons themselves.

5.8.1 Filter and Results Display

The screen allows users to find tasks using any or all of the following criteria:

- *Location Code*
- *Container ID*

The search results will be displayed in a grid showing the following details:

- *Date/Time*
- *Container ID*
- *Location*
- *Order #*
- *Type*
- *Container Status*
- *Hazardous*



- # Days on Site

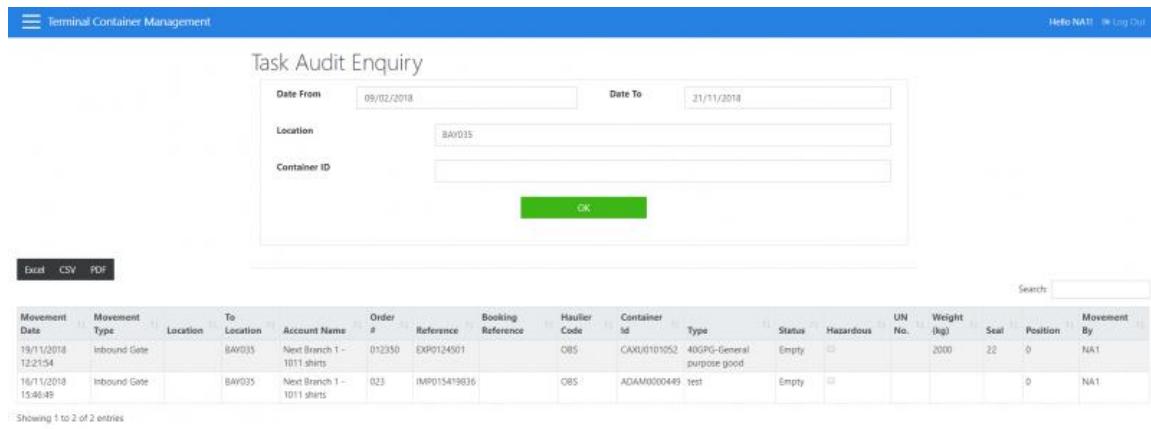
Note: *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to display the *Hazardous Type*.

The grid will be sorted by clicking on a column header, and can be exported to *CSV*, *Excel*, and *PDF* formats. Clicking on a container will show a screen displaying the container and all historical transactions for it.

Clicking on a container will show a screen showing the container and all historical transactions for the container.

5.9 Task Audit Enquiry

This screen allows the user to view the historical tasks that have happened to a container through the entry of Date Range, Location or Container



The screenshot shows the 'Task Audit Enquiry' interface. At the top, there are input fields for 'Date From' (09/02/2018), 'Date To' (21/11/2018), 'Location' (BAY035), and 'Container ID'. Below these is a green 'OK' button. At the bottom of the interface are buttons for 'Excel', 'CSV', and 'PDF'. To the right is a search bar. The main area displays a table of historical tasks:

Movement Date	Movement Type	Location	To Location	Account Name	Order #	Reference	Booking Reference	Haulier Code	Container Id	Type	Status	Hazardous	UN No.	Weight (kg)	Seal	Position	Movement By
19/11/2018 12:21:54	Inbound Gate		BAY035	Next Branch 1 - 1011 shirts	012350	EXP0124501		085	CAXU0101052	40GP/40-Gen eral purpose good	Empty	□		2000	22	0	NAT
16/11/2018 15:06:49	Inbound Gate		BAY035	Next Branch 1 - 1011 shirts	023	IMP015479836		085	ADAM0000489	test	Empty	□			0	NAT	

Showing 1 to 2 of 2 entries

This screen allows users to:

- See the movement history of containers and its locations by date range

5.9.1 Filter and Results Display

The user will be able to filter data through:

- *Date Range* (required)
- *Location code*
- *Container ID*

The results will be displayed in a grid showing:

- *Date/Time*
- *Movement Type*
- *From Location*
- *To Location*
- *Account*
- *Order #*
- *Haulier*
- *Container ID*
- *Type*
- *Container Status*
- *Hazardous*
- *UN Number*
- *Weight*
- *Seal*
- *Position*
- *Movement By*



Note: Seals are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to display up to 3 seals per container.

Note: Hazardous is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to display the *Hazardous Type*.

The grid will be sorted by clicking on a column header, and can be exported to *CSV*, *Excel*, and *PDF*.

5.10 Container Volumes Report

This screen reports on the number of containers in and out of the terminal by type

Movement Type	Count
Inbound Gate	197
Inbound Rail	137
Outbound Gate	124
Outbound Rail	96
Total	812

This screen allows users to:

- Report on the number of movements for a given date range. The results are shown by movement type.

The user will be able to filter data through:

- *Date Range* (required)

The date range defaults to the current year start/end.

5.11 Container Maintenance

This screen allows the user to see the stored details of a container.



Showing 1 to 547 of 547 entries

This screen allows users to:

- Search for container details by account or container id.
- Maintain details of containers held on the system
- Create new containers (i.e. enter details of containers not currently on the system)

5.11.1 Filter and Results Display

The user will be able to filter data through:

- Account
- Container ID

The results will be displayed in a grid showing:

- *Onsite Date/Time*
- *Account ID*
- *Account Name*
- *Container ID*
- *Type*
- *Weight*
- *Seal*

Note: Seals are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to display up to 3 seals per container.

Export buttons are available to export the rows of this table to *CSV*, *Excel*, and *PDF* formats, so the user can print these details if required.

Clicking on a container will display the full details of the container and allow the user to **edit** the details, saving the data with a **Save** button provided. A new container can be added through the use of a **New** button.



Container Maintenance

Edit Search

DateTime	11/09/2018 13:04:46	Container Id	123124123
Account	NEXT1: Next Branch 1 - 1011 shirts	Type	11: 11
Status	E: Empty	Hold Status	N: Normal/Free Stock
Hazardous	<input checked="" type="checkbox"/>	UN Number	2014
Weight	0	Seal	
		Update	Reset

Excel CSV PDF

Search:

Onsite Date	Account Id	Account Name	Container Id	Type Description	Weight	Seal
11/09/2018 13:04:46	NEXT1	Next Branch 1 - 1011 shirts	123124123	11	0	

Showing 1 to 1 of 1 entries

The following items may be edited:

- **Account** - Drop-down List.
- **Type** - Drop-down List.
- **Status** - Drop-down List; Container Status. Values from *Empty/Full/Empty (Damaged)/Full (Damaged)*.
- **Hold Status** - Drop-down List.
- **Hazardous** - Checkbox;
- **UN Number** - Auto-complete; Values are taken from the preloaded UN Numbers within the WMS tables; Entered only if the Container is marked as *Hazardous*.
- **Weight** - Textbox (numeric only).
- **Seal** - Textbox.

Note: Seals are subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to prompt for up to 3 seals per container.

Note: *Hazardous* is subject to internal confirmation of the business case and the raising of a new change request with Aptean. When confirmed, this is expected to allow a drop-down list of all *Hazardous Types* defined in the WMS.

Changes can be saved with the **Update** button and discarded with the **Reset** button.

5.12 Container Type Maintenance

This screen allows the user to maintain container types used by the system.



Type	Description	Refrigerated
20HQ2	Hazardous 20ft	NO
20OT	20OTG-20 Ft Open top-good	NO
22RC	REEFER CONT.(NO FOOD)	YES
22RT	REEFER	YES
33	Test 2	NO

This screen allows users to:

- View all of the container types held on the system
- Delete existing container types
- Amend the details of existing container types
- Add new container types

The screen will display all container types in a paginated grid immediately. The grid will show:

- *Container Type*
- *Description*
- *Refrigerated*

Clicking a row allows the user to **Edit** or **Delete** the container type (deleting requesting confirmation).

Export buttons are available to export the rows of this table to *CSV*, *Excel*, and *PDF* formats, so the user can print these details if required.

It is not possible to delete a record that is in use in the system either on an active or *completed* task or that is associated with an existing container.

It is only possible to edit the *description* and *Refrigeration* capability of the container.

The user can add a container type through the use of a **New** button.

There are no restrictions on creating new container type other than that the *container type* cannot already exist.

5.13 Location Maintenance

This screen allows the user to maintain the locations visible to the system.



The screenshot shows the 'Location Maintenance' screen. At the top, there are buttons for 'New' (blue), 'Save' (green), and 'Delete' (red). Below this is a table with columns for 'Location Code', 'Refrigerated', and 'Damages'. The table contains several rows of data, including BAY61, BAY66, BAY77, DAMAGE501, and DAMAGE502. At the bottom left, it says 'Showing 1 to 127 of 127 entries'. On the far right, there is a search bar and export options (Excel, CSV, PDF).

This screen allows users to:

- Search for details of existing locations
- Amend existing locations
- Delete existing locations
- Add new locations

The user is allowed to filter data through:

- *Location Code*

The results will be displayed in a grid showing:

- *Location Code*
- *Refrigerated*
- *Damages*

Clicking on the **Delete** button will allow the selected location to be deleted.

It is not possible to delete a record that is in use in the system either on an active or *completed* task or that is associated with an existing container.

A new location can be added by clicking a **New** button.

There are no restrictions on creating new locations other than that the *location code* cannot already exist.

5.14 Container Enquiry



Container ID

Search **Reset**

Container List

[Excel](#) [CSV](#) [PDF](#)

Search

Movement Date	Container Id	Location	Order #	Type	Status	Hazardous	Days On Site
27/09/2018 11:12:22	AKA0013519	HUAW001		40GP-General purpose good	Empty/Damaged	NO	54
	AKA0013524	200TG		40HCG-High cube good	Empty	NO	0
19/09/2018 14:39:49	AKA0013530		1	40GP-General purpose good	Empty/Damaged	NO	60
19/09/2018 14:38:31	AKA0013545	BAV015	AKA/NU004	20ft (6.00m)	Empty	NO	62
26/09/2018 11:12:22	AMFU1219928	BAV014	1	200TG-20 Ft Open top	Empty/Damaged	YES	55

Showing 1 to 1,025 of 1,025 entries

This screen allows users to:

- Search for specific containers and view movement history of those containers

This screen is linked to directly from a web-site page, for customers to view the status of their containers.

This screen displays a filter of *Container code*.

Under this will be the last 20 transactions for that customer (Account).

When a container is entered and the **Search** button is pressed, the screen will call the existing Container Enquiry Results screen, as shown above in the Location Enquiry screen.



6 PDA Functionality

Note: Although the PDS screens are created for use on the mobile devices, they will also work and be accessible through the Admin system.

6.1 PDA Login

This screen allows drivers to:

- Login by selecting their *User Name* and entering their *Password*. They then click the **Log In** button.

They will be taken to the PDA home screen with menu - see [PDA Menu](#)

6.2 PDA Menu

This screen allows drivers to:

- Select an activity to perform

6.3 PDA Work in Progress

This is a series of screens to allow the drivers to move containers in and out of the yard. Initially, the process shows a Vehicle List. **Note** - although this screen is created for use on the mobile devices, this screen will also work and be accessible through the Admin system.



Inbound/Outbound Rail IMP1808231700 IMP1808241800	Inbound Vessel IMP1808290900	Outbound Gate BJ44RGG
Outbound Gate HJ66ERR	Inbound/Outbound Gate M4 RCV	Inbound Rail IMP1809131930
Inbound Vessel IMP1809202010	Inbound Vessel VOY-1008C	Inbound Rail IMP1809281501

This screen allows drivers to:

- Select a job to complete

6.3.1 Work Selection

Each item shown is the *Registration* (or train/voyage) or a container to move, plus the *type*, e.g., *AB123 BVC (IG/OG)*. Types are:

- *IG - Inbound Gate*
- *OG - Outbound Gate*
- *IH - Inbound Road*
- *OH - Outbound Road*
- *IV - Inbound Vessel*
- *OV - Outbound Vessel*
- *MV - Move (De-stuffing)*

If there are multiple tasks for a Gate task (*Inbound* and *Outbound*) they are shown here as *IG / OG*.

Move tasks will be shown as *{Container ID} (MV)*.

Unlinked *IV* and *OV* Vessel tasks are always shown separately, e.g., *42352334 (IV)*, *4839423(OV)*.

Linked *IV* and *OV* Vessel tasks will be shown as the *inbound voyage reference* and showing the *outbound voyage reference* as part of the detail of the task. E.g.,

32028323 (IV/OV)

32928182

This screen shows all the outstanding tasks, with a *date* less-than or equal to today's date, with the eldest shown first. Move tasks will only be shown on or before the *date* and *time* they are due (shown earlier based on a system parameter *CYMR* which specifies a *number of minutes* that a task can be shown before it is actually due to start).

The user clicks the *registration*.

If the *type* is *IH* or *OH* continue to Registration Entry.

If the *type* is *MV*:

- If the task has a *?Location To?* then skip to Move to Bay Door.
- If the task does not have a *?Location To?* then skip to Location Selection.

Otherwise continue to Container Selection.

6.3.2 Registration Entry

The screen will prompt for a *registration*; this will default to the *registration* of the task. The user can overtype with the *actual registration* of the vehicle that has arrived. Once confirmed the process moves to Container Selection.



6.3.3 Container Selection

If the *type* is *IG / OG, IG, OG, IH, OH*:

- The unit shows the containers associated to the *registration*, with an indication of *Full* or *Empty*, e.g., *ALCU1234567 (F)*, *ALCU1234567 (ED)*.
- All *Inbound* types will be shown first, followed by all *Outbound* types.

If the *type* is *IR, IR / OR, IV, IV / OV*:

- The unit shows the containers associated to the *registration*, with an indication of *Full* or *Empty* e.g., *ALCU1234567 (F)*, *ALCU1234567 (ED)*.
- All *IR/IV* containers are shown if they exist, in *Container ID sequence*.
- A **Switch** button on the top will allow the user to switch to the linked *OR/OV* type, if there is one.

If the *type* is *OR, IR / OR, OV, IV / OV*:

- All *outbound* containers are shown in *Position sequence*, with an indication of the *position* e.g., *ALCU1234567 (Pos 1)*, *ALCU1234567 (Pos 49)*.
- A **Switch** button on the top will allow the user to switch to the linked *inbound type*, if there is one.

A Container marked as *Hazardous* is identified with a *red warning icon* in the *top right hand corner*.



The user clicks a container to continue with this task.

Clicking on an *Inbound* container will take the user to Weight and Seals Entry, if this container is for *Export* (i.e., planned on an *outbound vessel*), otherwise the user will be taken to Location Selection.

Clicking on an *Outbound* type task that has a *container id* other than one beginning with *?EMPTY?* will take the user to Outbound and Known Container.

Clicking on an *Outbound* type task that has a *container id* beginning with *?EMPTY?* or is *blank* will take the user to Outbound and Unknown Container.

6.3.4 Weight and Seals Entry

The device will prompt for the *weight* of the container and the *seal*.

Completing this stage will take the user to Location Selection.

6.3.5 Location Selection

The device shows the container details and a suggestion of where to take container.

Location is suggested by listing all locations available. They are ordered as:

- *Suitability*
 - ◆ If *damaged status* then a *DAMAGES Location*.
 - ◆ Contains the same *Container Type* already or is *Empty*.
 - ◆ Contains a different *Container Type*.
- *Partially Full*
 - ◆ Already has containers of that type (Green Tick).
 - ◆ Empty (Orange Tick).
 - ◆ Else (No formatting).

The user then clicks the chosen location, and then clicks the **Confirm** button. The user is taken to the Confirmation page.



6.3.6 Outbound and Container Unknown (Empty Collection)

The device shows the container details required, and the locations that contain that type.

The user clicks a location to see the containers available in the location (sorted in *LIFO sequence*), indicating which containers are *empty*.

At this point the user has the option to click **Relocate** and a container to be offered a list of locations in which to relocate the container specified.

Once the container is found, the user clicks **Confirm**. The user is taken to the Confirmation page.

6.3.7 Move to Bay Door

The device shows the container details and shown the *location* to get the container and where to take the container to.

Confirm and **Back** buttons will be present. If the user clicks **Confirm** they are taken to the Confirmation page.

6.3.8 Outbound and Known Container

The device shows the container details and shown the *location* to get the container.

At this point the user has the option to click **Relocate** and a container to be offered a list of locations in which to relocate the container specified.

Once the container is found, the user clicks **Confirm**. The user is taken to the Confirmation page.

6.3.9 Confirmation

The user is informed of the action they are about to take and are presented with **Confirm** and **Back** buttons.

If this is *Inbound Road (IH)* or *Outbound Road (OH)* a **Signature** button will also be present if this is not the last task for the *registration* (if the system is configured to prompt for signatures for the given task type).

On clicking **Confirm**:

- If this is a road task (*IH, IG, OH, OG*) and this is the final task for the *registration* then go to the Signature page.
- Otherwise the Task is marked as *completed* (see Task Completion Updates below).
- If this was the last task or a *MV* task then the user is taken back to the Work Selection page otherwise the user is taken to Container Selection.

On clicking **Signature**:

- The user is taken to the Signature page.

6.3.10 Signature Capture

The driver is required to enter their *signature*.

The screen will show the tasks *completed* related to the recorded *registration*.

A **Confirm** and **Back** button will be present.

On clicking **Confirm** the task is marked as *completed* (see Task Completion Updates below).

The *Driver Signature* is saved, stamped with the *Date and Time* and a *unique ID*. The Task is marked as *completed* (see Task Completion Updates below).

The *Signature ID* is marked against the *completed* tasks.

If this was the last task then the user is taken back to the Vehicle Selection page otherwise the user is taken to Container Selection.



6.3.11 Task Completion Updates

If the task has a *quantity greater than zero* then:

- A new moves record is created with the details of the container selected. The move is marked as *completed* in the system, marked with the *current date and time*, and the *user that completed it*.
- The new *task quantity* is calculated as being *one less than current*.
- If the task's *new quantity* has reached *zero* then the task is deleted, otherwise the task is updated with the *new quantity*.

If the task has a *quantity of zero* then the task is marked as *completed* in the system, marked with the *current date and time*, and the *user that completed it*.

If the task is *Inbound* or *Outbound road*, then related bookings within the Bay Diary system will be marked as *processed*.

If the task is *Outbound Haulier* and the container is *Full* or *Full/Damaged*:

- If WMS and Bay Diary systems are both integrated:
 - ◆ On completing the last task of a *multi task registration* the *order number* should be stored against the *booking* in the *bay diary* (more information needed).
- If WMS system is integrated:
 - ◆ On completing the last task for a *registration* the *order* associated to the task should be marked as *despatched* (more information needed).
- If WMS system is not integrated but the bay diary system is integrated:
 - ◆ On completing the last task for a *registration* the *bay diary booking* associated to the task should be marked as *processed* (more information needed).

If the task is an *MV* task which originally had a *location to* then:

- Any associated Bay Diary tasks will be updated to *status of ?Arrived?*.
- If the *YBW1 rule* within the WMS is set to *?Y?* and the Warehouse system is integrated then the *Goods Receipt pre-advice* associated to the *bay diary booking* should be released to WCS.

6.4 PDA Relocate Container

This screen allows the user to manually relocate containers.

Relocate Container

Select a location to relocate a container from

Location BAY001	Location BAY002	Location BAY003
Location BAY004	Location BAY005	Location BAY006
Location BAY007	Location BAY008	Location BAY009

This screen allows drivers to:

- Change the location of a container

6.4.1 Process

The user is shown a list of locations.

The user selects one.



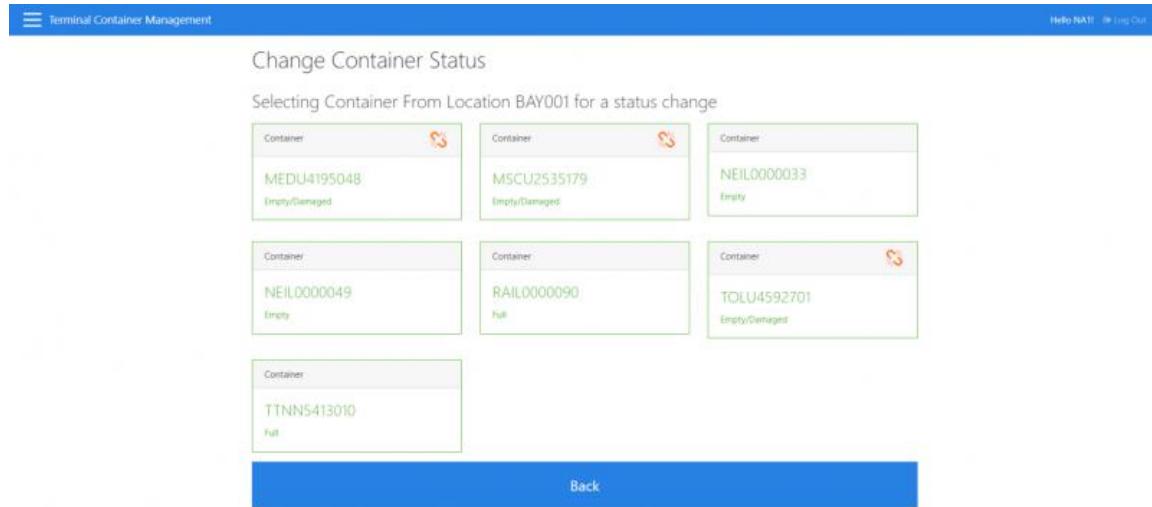
The device then displays a list of the containers in this location. The user can then click one of the containers in the list.

The device displays the container information and lists a series of new locations. The user can click a *new location* (or a **Back** button).

Once a *new location* is chosen, the user can click a **Confirm** button to confirm the changes and start another relocation.

Note: Although this screen is created for use on the mobile devices, this screen will also work and be accessible through the Admin system.

6.5 PDA Change Container Status



This screen allows drivers to:

- Change the status of a container

6.5.1 Process

This screen allows the user to change the *status* of a specific container. The user is shown a list of locations.

The user selects one.

The device then displays a list of the containers in this location. The user can then click one of the containers in the list.

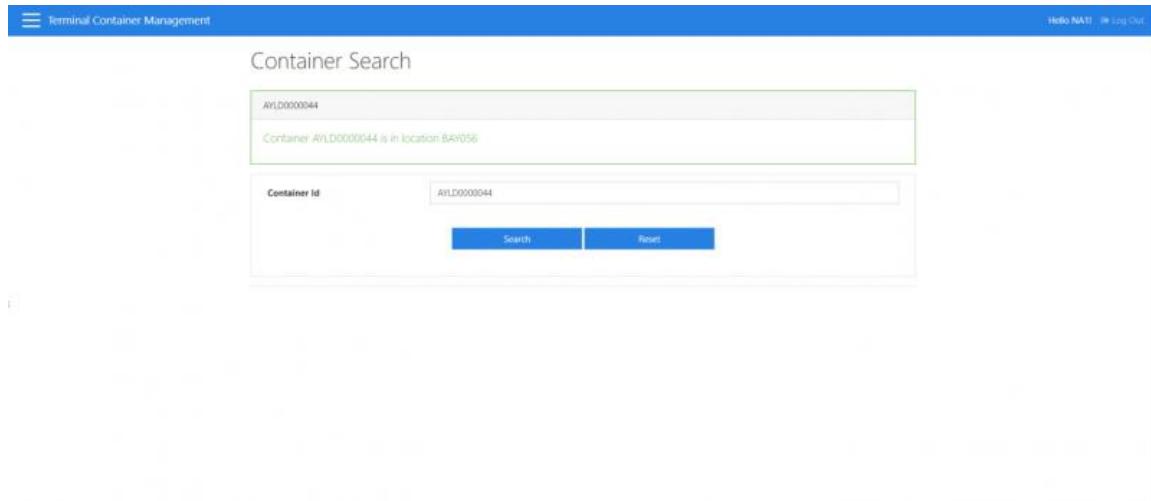
The device displays the *current status* of the container and buttons for each of the *available statuses* to change to.

The user can then hit the **Confirm** button to confirm the changes and start another change of *container status*.

Note: Although this screen is created for use on the mobile devices, this screen will also work and be accessible through the Admin system.

6.6 PDA Container Search





This screen allows drivers to:

- Display the system held location of a given container.



7 Appendix A Document History

References

Ref No	Document Title & ID	Version	Date
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

Glossary

Term or Acronym	Meaning
WMS	Warehouse Management System, controlling all of the actions within a warehouse, like goods in/out, relocation, stock management, etc. The Aptean WMS is CALIDUS 3PL WMS (C-WMS).
WCS	Warehouse Control System, executing all of the actions within a warehouse, like goods in/out, relocation, stock management, etc, usually through mobile devices. The Aptean WCS is CALIDUS WCS (C-WCS).
TCM	Terminal Container Management, a system for managing container yards and the tasks inbound and outbound from it. The Aptean container yard management system is CALIDUS TCM.
ToC	Transfer of Custody; Traffic Control; The action of controlling vehicles arriving and departing into warehouse bays. The Aptean traffic control system is CALIDUS ToC.
Bay Diary	The use of timed slots into or out of bays within a warehouse is called a Bay Diary. A Bay Diary system also controls booking slots, arrival and departure statuses, labelling, etc. The Aptean Bay Diary system is called CALIDUS Bay Diary.
Container Yard; Container Storage	Where containers are stored.
Seals	Containers are sealed at source and whenever they are opened in transit, to ensure that the contents are not tampered with.
Container	A container consists of an ID, Type and Status.
Container ID	The unique ID of the container. This defines many properties of the container, such as which tasks (in the container yard and in the warehouse) are associated with it.
Container Type	The type of container. E.g. 20ft container. Refrigerated Container
Container Status	A quick guide to where the container is up to. Values from E(Empty)/F(Full)/ED(Empty/Damaged)/FD(Full/Damaged).
Vessel	Ship.
Voyage	A specific journey of a vessel.
Voyage Reference	(Vessel Tasks Only) The unique reference of the voyage of a vessel.
Registration	The vehicle registration (road) or voyage reference (voyage).
Location	A location in the yard. E.g. BAY001, TRAIN001. Locations may be stacked, and therefore the sequence of the container in a location is important.
Position; Sequence	Referring to locations, it is specifically the position in which the container is located in a location. For example, the lower sequence container in a stack may not typically be moved without first moving any higher-sequenced containers first.
Reference	(Road Tasks Only) Job Reference that is used to identify the job on Work In Progress mode. This field is automatically generated depending on Haulier, date and time. This field can be manually edited.
Account ID; Account Name	The client account id and name. The account that the order(s) relate to.
Haulier	The Haulier used to bring to goods to/from the container yard. Only available for entry for Gate- and Road-based tasks
Carrier	The carrier used. Only available for Vessel based tasks.
Service	The service used. Only available for Vessel based tasks.
Movement; Movement Type; Task	A movement of a container to a location, between locations, onto or off a vessel or from the road. The type of movement/Task - e.g. Inbound Gate, Outbound Vessel etc.
Hazardous; Hazardous Type	Indicates if the container contains a hazardous substance or material. The hazardous types indicate what category of hazardous material is stored, which aids in determining compatibility with other



Term or Acronym	Meaning
	containers of the same hazardous type.
UN #	If the container is flagged as hazardous, this will show the relevant UN number
Order #	The order number associated with the task
GRN	Goods Received Number. A unique identifier for a goods receipt. In Container Yard terms, this will be the action of taking goods off a vessel or out of a container and storing them in the warehouse.
Reference	Job Reference that is associated with the task
Booking Reference	Reference from Bay Diary
Outbound Vessel; Inbound Vessel	The direction of the vessel's voyage. In other words, are items being loaded onto the vessel, or taken off the vessel. In many cases, there can be a planned inbound and outbound vessel task for any vessel's voyage.
Inbound/Outbound Road	Tasks arriving or departing through the road network
Inbound/Outbound Rail	Tasks arriving or departing through the Rail network
Inbound/Outbound Gatehouse	Tasks arriving or departing at the gatehouse
Task Status; Unconfirmed; Confirmed	Items are created at an "unconfirmed" state and need to be confirmed for them to be made available for users to execute.

General System Terms

EDI	Electronic Data Interchange, a mechanism for sending information between computer system, such as receiving orders, voyages, etc.
RDT; PDA; Mobile Device	Radio Data Terminal; Personal Digital Assistant. Essentially, any kind of mobile, wireless device. Used for mobile users when accessing the system, for example, with WCS when controlling the movements of pallets in the warehouse, and outside container movement tasks.
SCR	Software change request

App Terms

Auto-Complete	When typing into a textbox, matching selections will be shown in a drop-down list below, as you type.
Drop-down List; DDL	Clicking on the entry box will show all applicable values below.
Checkbox	A simple yes/no, enabled/disabled indicator. If it is checked, this means yes/enabled, else no/disabled. You can change the state by clicking on it.
Textbox	Any field in the system which is designed to allow you to type into it, rather than click, select or other kind of action. These can be specific types (numeric, text, and other types of patterned entry. Text boxes can also be auto-complete.
Tab	A Tab is a kind of button that hides more things to enter. When you click it, the extra fields on the tab are shown, typically hiding others in the same tab group. In these guides, tabs are denoted by their label, in <i>italics</i> .
Button	Any pressable or clickable button that instigates an Action. In these guides, buttons are denoted by their label in Bold
Field	A Field is a place to see or enter data. This can be a textbox, checkbox, drop-down list, cell, etc. Typically they will be associated with a label that shows what this field is for. In these guides, fields are denoted by their label, in <i>italics</i> .
Table; Grid	Results represented in a tabular notation, Consisting of Rows and Columns. Typically with a Header row. Individual data is in a Cell.
Keys	Keyboard presses. In these guides, keys are denoted by their key in fixed formatting e.g. ENTER .
Menu	The menu of the system is typically situated on the left of the screen, and is typically activated by clicking the menu button. Again, typically this is denoted by 3 horizontal lines stacked on top of each other. Clicking the button will show the menu. Clicking again will hide the menu. Each menu contains menu items, or menu groups, which can also contain menu items. A menu item will take you to the screen it describes.
Find; Filter; Search	Associated with finding data, and the matching results being shown in a results table or screen. Typically, Find/Search means finding the data initially, whereas filter means getting the results, and then narrowing them down, typically through the use of a filter or search text box, either filtering the whole result set and all columns, or specific filters per column. Usually, typing in the filter will immediately filter the results as you type.



Term or Acronym	Meaning
Export	Usually associated with a results table or data on a screen, if allowed, there will be buttons to export the data shown from the system to your local PC, typically as a Spreadsheet (XLS), PDF or CSV.
Sort	Usually associated with tables, this is the action of sorting the data Ascending or Descending (smallest to biggest, lowest to highest, earliest to latest, or vice versa). Usually, this involves clicking on the table row column header, each click cycling between Ascending or Descending.
Action	An action is a general term showing something you as a user want to do. Typically this is associated with a button to press (Confirm , Next , OK , etc). Clicking or pressing this button will usually take you to the next step.
Step	<p>A step is a stage in a process. For example, a simple movement of a container from one location to another might consist of the following steps:</p> <ol style="list-style-type: none"> 1. Enter a location 2. Enter a container 3. Enter the new location

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