

System User Guide
For
ESP V8 Planning



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Introduction

ESP (Enterprise Software Planner) is a windows planning tool that interacts with GTS (General Transport System). Master file data, Order details, Order haulage plans & Order invoicing data is held in GTS. Orders are interfaced through to ESP enabling jobs to be planned to loads, resourced and debriefed. Details of the haulage plans and load completion are uploaded back to GTS. Orders can also be created and amended in ESP, these details will also be uploaded back to GTS

Accessing ESP and Logging In (Citrix)

1. Click on the ESP icon from the Citrix Desktop
2. The **ESP login screen** will be displayed

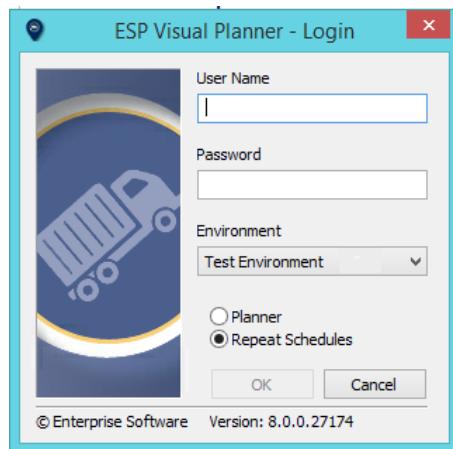


Figure 1

3. Key in Username and password
4. Click **OK**

The **ESP Loading screen** will be displayed and then after a few seconds the **Depot Selection window** will be displayed:

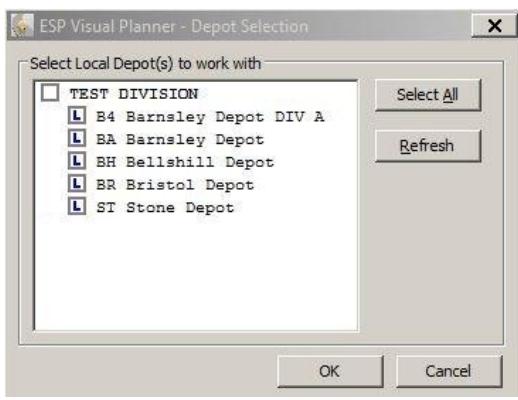


Figure 2

(Multiple depots will only be displayed if the relevant system authority has been granted)
From the Depot Selection window (Figure 2)

5. Click **□** to select a depot. More than one depot can be selected only if the user is authorised
6. Click **OK**

Logging Out of ESP

1. From the Menu
2. Click **File, Exit**
3. Alternatively click on the X in the top right hand corner of the ESP window

ESP Traffic Sheet and Order Pool Windows

The Order Pool and Traffic Sheet allow Orders to be displayed and loads to be built and planned. Multiple Order pools and Traffic sheets can be displayed in ESP.

Display Windows

When order pools or traffic sheets are displayed, they are positioned on the right hand side of the ESP window. Order pools and traffic sheets can be repositioned at the top, bottom, left or right of the screen.

Display the Order Pool

From the Toolbar:

1. Click  to display an order pool or click **File, New Order Pool** from the menu

Display the Traffic Sheet

From the Menu:

1. Click **File, New, Traffic Sheet**

Moving and Positioning Windows

Windows can either be floating, docked or auto hidden in ESP.

Docking Windows

There are four dock positions available for windows in ESP. Windows can either be positioned at the top, bottom, left or right of the screen. When a window is repositioned dock arrows appear on the screen these arrows determine the position of the window.

Display the window to be docked:

1. Move the mouse pointer onto the Title bar of the window (Figure 3)

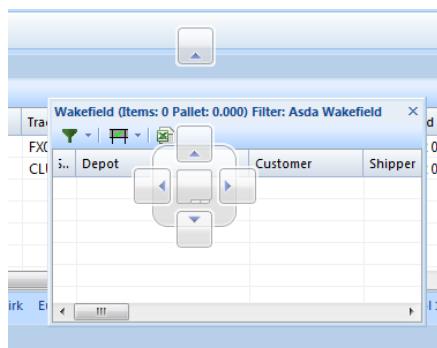


Figure 3

2. Drag the window over to the centre of the ESP window
3. Dock Arrows (positioning markers) will be displayed on the screen
4. Move the mouse pointer over one of the dock arrows (shading will be visible on the screen to indicate the new position of the window) (Figure 4)

Note: Moving a window over the central docking point will allow the window to be docked on top of the current window.

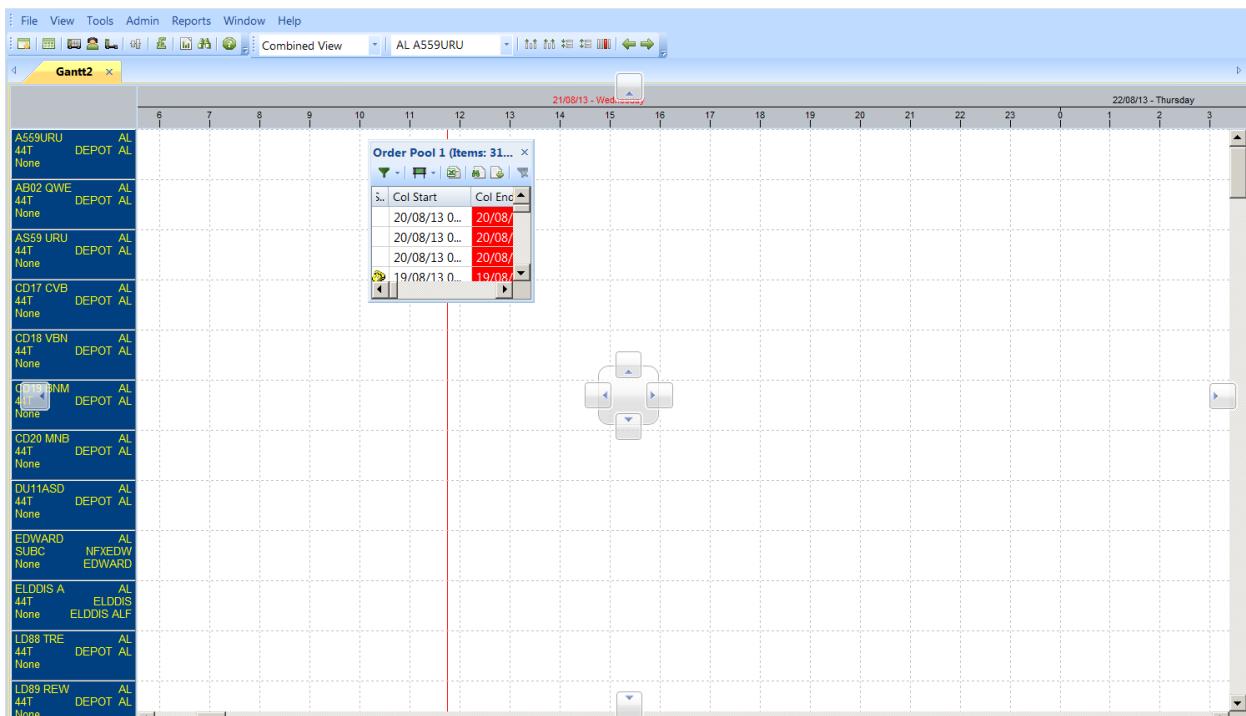


Figure 4

The Docking arrows  on the screen indicate where the window will be positioned. The central dock points perform the same function as the outer dock arrows and are there to make repositioning windows easier.

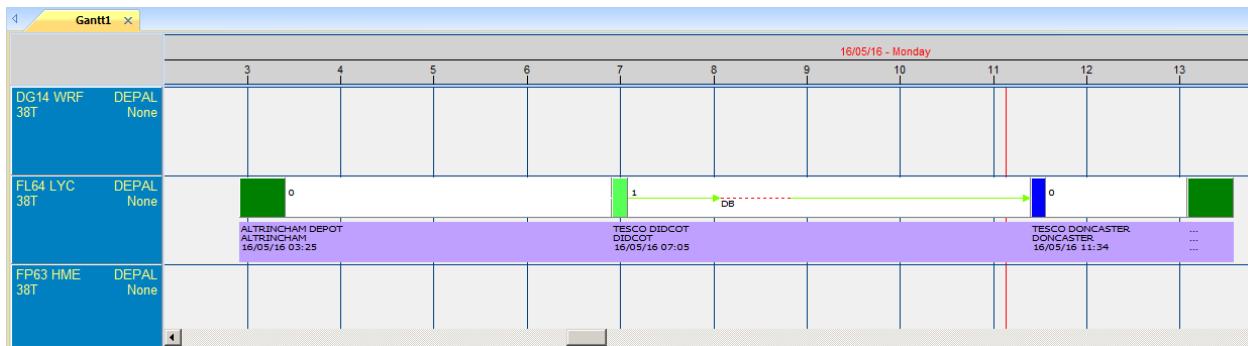
10. Release the mouse button to move the window
11. The window will be positioned as required

See the Customising ESP section to see more details relating to Floating, Docking and Autohiding windows.

Gantt Chart

The Gantt Chart displays coloured blocks on the left representing the Tractors for the depot(s) The remainder of the Gantt chart is used to display planned loads against the Date/Time line. There are different views for the Gantt chart and a selection of toolbars that contain tools for finding and viewing information.

The Gantt Chart in ESP:



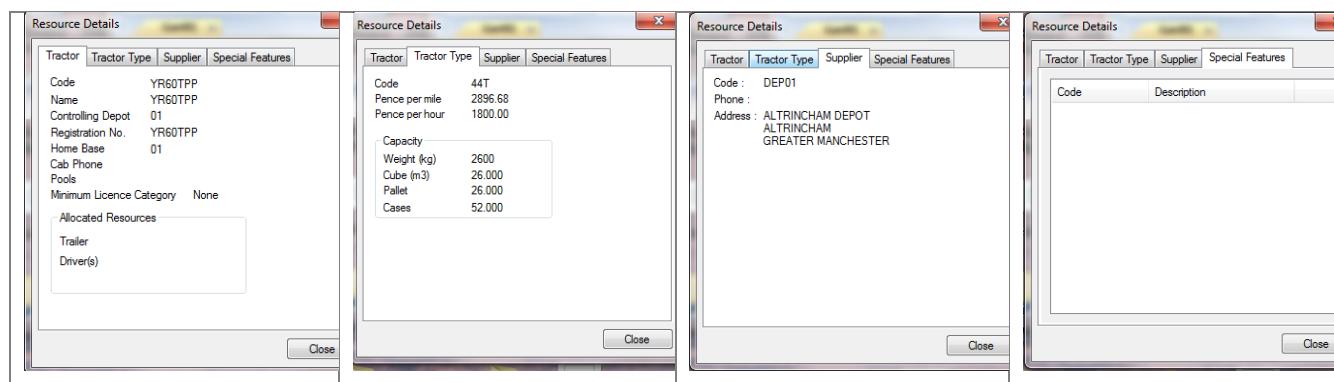
Primary Resources (Tractors)

Primary Resources (Tractors) are displayed on the left hand side of the Gantt Chart. The resource details are held in the GTS Tractor Master File – details such as default driver/trailer and tractor type are accessible in ESP by displaying the properties for the resource. Tractors are added or changed in GTS (see section later in this guide)

Tractor Properties

1. Right Click on any Tractor on the Gantt chart
2. Click Properties

The Resource Details window is displayed:



3. Click on each of the Tabs to view the Resource Details for the selected tractor

Moving around the Gantt Chart

Use the Scroll bars to move upwards, downwards or across the timeline on the Gantt chart.

Scroll Bar

1. Click on either the Horizontal or Vertical scroll bar
2. Drag the mouse pointer to scroll to the left and right/top and bottom of the Gantt chart

Closing the Gantt Chart

The Gantt chart can be closed if required (new Gantt charts can be opened up at a later stage if necessary)

To Close the Gantt

1. Click the Cross on the Gantt Chart tab

Opening a New Gantt Chart

New Gantt Charts can be opened using the File option on the Menu

1. From the menu, Click **File, New Gantt**

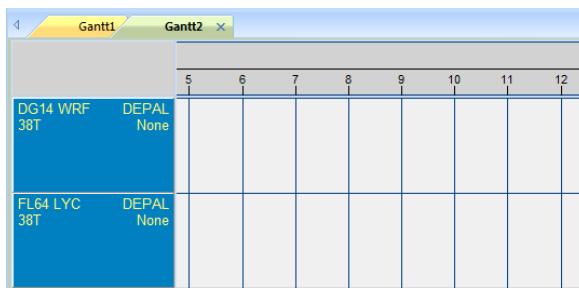


Figure 5

The Gantt Chart will be displayed, multiple Gantt charts can be opened if required

Renaming a Gantt Chart

To rename a Gantt chart:

1. Right click on the Gantt chart tab
2. Click **Set Name**, Key in the new Name and Click **OK**

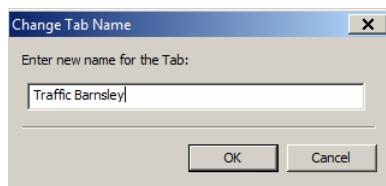


Figure 6

Displaying information

Order Pool, Traffic Sheet & Load Manager Columns

The Columns displayed in Order Pools and Traffic sheet can be changed (Removed/Added) to match the planning requirements of the user.

Add/Remove Columns

From the Order Pool or Traffic Sheet window,

1. Click 

The Select Columns window is displayed:

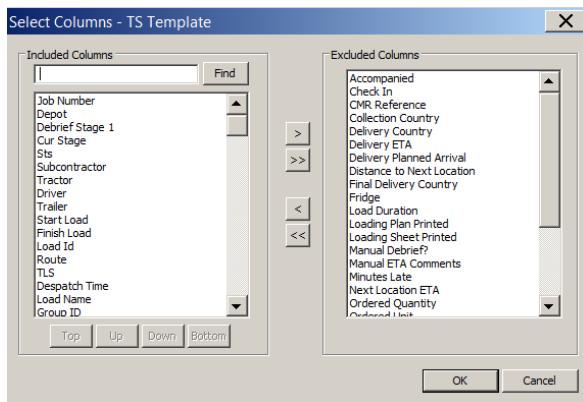
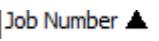


Figure 7

The left hand side of the window displays columns that are included in the Order Pool/Traffic Sheet. The right hand side of the window display columns that are excluded from the order pool window. Use the arrows in the middle of the window to move columns between excluded and included columns.

2. Select the column from the Included columns list
3. Click  to move the column into the excluded columns area on the right of the window
4. Click  to move all the columns into the excluded columns area on the right of the window
5. Click either  or  to move columns back into the included columns area on the left of the window

Note: Columns displayed with an arrow  indicate that the column has a sort applied in the window.

Change Column Order

The columns displayed in the order pools can be re-ordered at any time (Left to Right) by dragging and dropping them into their new position. Alternatively, the Select columns window can be used to move columns up or down. Moving columns up or down moves the columns to the left or right of the window

From the Select columns window (Figure 7)

1. Select the Column(s) to move (use Ctrl and Click to select more than one column)
 2. Click on either **Up** or **Down** to move the columns up or down in the list
 3. Click on either **Top** or **Bottom** to move the column to the selected columns to the top or bottom of the list
- Note: The order Top to Bottom in the list will be displayed left to Right in the order pool.

Column Templates

Columns in the order pool windows can be hidden and re-ordered to make it easier to see key information about the orders. These settings can be saved as a Column Template. Column templates can be shared to allow other users to access them if required.

Creating a Column Template

1. Display/Hide the columns as required in the window (see previous section for details)
2. Click on the Drop down arrow to the right of the Columns button 
3. Click Save As..
4. Key in a Template Name
5. Select the **Shared** option (only available if the relevant user authority has been granted in ESP admin)
6. Click **Save**

Note: The shared option allows others to see and use the column template, but not amend it. Amendments can only be made by the user who created it

Applying a Column Template

Display a new Order Pool

1. Select the Template from the **Column Template** drop down list and Click **OK**

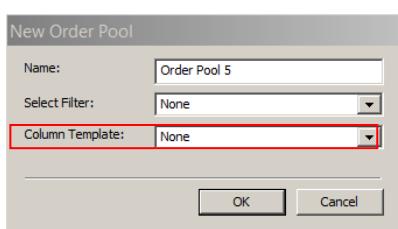


Figure 8

Alternatively, from an Open Order Pool or Traffic Sheet:

1. Click on the Drop down arrow to the right of the Columns button 
12. Click Replace...

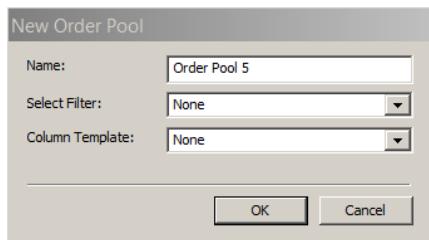


Figure 9

13. Select the Template from the **Column Template** drop down list

14. Click **OK**

Load Manager Column Templates & Defaults

The Column settings in the Load Manager window can be saved as a template. The template will need to be set as a default for the Load Manager if the settings are to be retained after logging out.

1. From the Open Load Manager Window:
2. Click on the Columns button 
3. Add/Remove columns into the included columns section on the left
4. Click OK
5. Click on the drop down arrow to the right of the columns button 
6. Click Save As

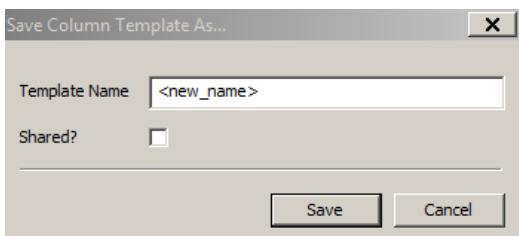


Figure 10

15. Key in a Template Name
16. Select the Shared option (only available if the relevant authority has been granted in ESP Admin)
17. Click **Save**
18. Click on the drop down arrow to the right of the columns button 

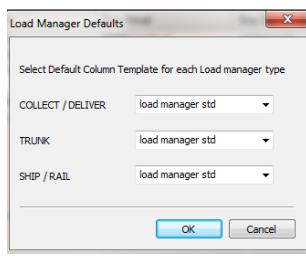


Figure 11

19. Click Defaults
20. Click the Drop down arrow by each of the Load Types (Collect/Deliver, Trunk, Ship/Rail) and select the template required
21. Click **OK**

In the example above the same template will be used for all Load Types.

Sorting Data in Windows

Data can be sorted either by single or multiple columns in each window.

Sorting Data

1. Locate the column be sorted
2. Click once on the column heading to sort the data in ascending order, Click again to sort in descending order

Column sorted in Ascending Order	Column sorted in Descending Order
Tractor 	Tractor 

3. To Sort by Multiple columns, hold down the shift key and click on the next column, Shift & Click again on the column to change the sort order or to remove the sort.

The Column headers will display an ascending or descending arrow to indicate the sort order. In addition, sorted columns are shaded slightly to differentiate them from other columns in the window.

Order Pool 1 (Items: 204 Dolly: 2916.340) Filter: All Orders													
▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	
Cur Stage	Delivery Cycle	Cur Type	A.	Pre-Book ...	BK Ref	Sts	Customer Code	Customer Refere...	Job Number	Depot	Collection ...	To Town	Col Start
NP	AM	C&D					ABCLIV	ABCLIV80	TH/0000161	TH	ABC CHESTER	LIVERPOOL	15/04/16 00:00
NP	AM	C&D					ABCLIV	ABCLIV77	TH/0000158	TH	ABC CHESTER	LIVERPOOL	15/04/16 00:00

Toggle Sorts

Once a sorting order has been established, the sort can be toggled **off** or **on** by clicking on the Toggle Sort button

Before Clicking on Toggle Sort													After Clicking on Toggle Sort												
Order Pool 1 (Items: 178 Dolly: 2768.880) Filter: All Orders													Order Pool 1 (Items: 178 Dolly: 2768.880) Filter: All Orders												
▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	
	Cur Stage	Delivery Cycle	▼	Cur Type	▼	A.	Pre-Book ...							Cur Stage	Delivery Cycle	Cur Type	A.	Pre-Book ...							
NP	AM	C&D											NP												
NP	AM	C&D											NP												

- If the Toggle Sort button is clicked again the last set of sorts will be applied to the window.

Remove a Multiple Column Sort

1. Shift and Click onto any single column heading until the sorting arrow is removed (Shift and Click once to sort in ascending order, Shift and Click again to sort in descending order, Shift and Click a third time to remove the sort arrows from the column)

Filtering

There are three different ways of filtering orders and loads in ESP. Simple, Standard or by using the Filter Bar. Simple Filters and the Filter Bar allow data to be quickly filtered in a window, these filters cannot be saved. Standard filters can be saved, used in views, have more options and if applied, are retained after logging out.

The following planning windows can have filters applied:

- Order Pool
- Traffic Sheet
- Inbound
- Supplier Bin

The Resource windows also have their own filter option that are not retained after logging out

- Tractor, Trailer or Driver

Simple Filters

Create Simple Filters

Locate the column heading in the window that is going to be used as a filter:

1. Right Click on the Column Heading

The Column that is selected determines the type of filter to be applied, there are Date/Time Filters, Number Filters, Text Filters or Filters for Images. The following example is setting a Text filter.

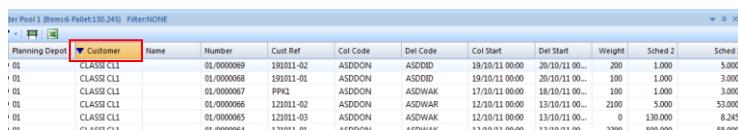
22. Click Text Filter

23. Select one of the filter options (for example equal or does not equal – Some columns can display the option to select code from list, ESP will display a list of valid entries that can be selected)

24. Key in the text for the filter (for example PL or BK – for orders at Planned or Booked Stage)

25. Click **OK**

Jobs matching the criteria will be displayed in the window.



Planning Depot	Customer	Name	Number	Cust Ref	Col Code	Del Code	Col Start	Del Start	Weight	Sched 2	Sched 1
I 01	CLASSI CL1		01/000069	19011-02	ASDONON	ASD01D	19/01/11 00:00	20/10/11 00...	200	1.000	5.000
I 01	CLASSI CL1		01/000068	19011-01	ASDONON	ASD01D	19/01/11 00:00	20/10/11 00...	100	1.000	3.000
I 01	CLASSI CL1		01/000067	19011-03	ASDONON	ASD01W	19/01/11 00:00	19/10/11 00...	100	1.000	3.000
I 01	CLASSI CL1		01/000066	122011-02	ASDONON	ASDWAIR	12/01/11 00:00	13/10/11 00...	2000	5.000	53.000
I 01	CLASSI CL1		01/000065	122011-03	ASDONON	ASDWAIR	12/01/11 00:00	13/10/11 00...	0	130.000	6.245
I 01	CLASSI CL1		01/000064	122011-01	ASDONON	ASDWAIR	12/01/11 00:00	13/10/11 00...	2000	500.000	58.000

Figure 12

Any Column that has a filter applied will display  In the example above the Customer column has had a filter set to display Orders for Customer - Classi CL1. Filters can be applied to other columns in the window if required.

Remove Simple Filters

To remove a simple filter from a column:

1. Right Click on the **Column Heading**
2. Click Clear Current Filter to remove the filter from the column
3. Alternatively;
4. Click the Clear all Column Filters button  to remove filters from all columns.

Filter Bar

1. Click the Filter Bar Button to show or hide the filter bar 

Order Pool 1 (Items: 13 Dolly: 71.060)

Cur Stage	Delivery Cycle	Cur Type	A.	Pre-Book ...	BK Ref	Sts	Customer Code	Customer Refere...	Job Number	Depot
NP	AM	COL					ABCCHE	CC4	TH/0000063	
NP		COL					ABCCHE	CC10	TH/0000069	
PL	AM	COL					ABCCHE	CC6	TH/0000065	

2. Once the filter bar is displayed, values can be entered in any of the columns to further filter the data displayed in the window.

Order Pool 1 (Items: 13 Dolly: 71.060)

Cur Stage	Delivery Cycle	Cur Type	A.	Pre-Book ...	BK Ref	Sts	Customer Code	Customer Refere...	Job Number	Depot
x	<call>	<call>	<call>	<call>	<call>	<call>	ABCCHE	4	<call>	s
CO	AM	COL					ABCCHE	CC04	SH/0000085	SH

In the example above the window has been filtered by customer references that include 4 and by depots that include S.

3. To remove the Filters, click on the X to the right of the filter or click on the X to left of the filter bar to remove all filter bar filters.

Order Pool 1 (Items: 13 Dolly: 71.060)

Cur Stage	Delivery Cycle	Cur Type	A.	Pre-Book ...	BK Ref	Sts	Customer Code	Customer Refere...	Job Number	Depot
x	<call>	<call>	<call>	<call>	<call>	<call>	ABCCHE	4	<call>	s
CO	AM	COL					ABCCHE	CC04	SH/0000085	SH

Standard Filters

Standard filters enable multiple column filters to be applied to a window and saved. The filters can be applied and removed from windows to include or exclude orders in the window as required. Standard filters are created using the Filter Manager.

Filter Manager

The Filter manager allows standard filters to be created, modified and deleted for Order Pools, Supplier Bin, Inbound and Traffic Sheet Windows.

Create Standard Filters

From the Menu:

1. Click Tools, Filter, Filter Manager

The Filter Manager window is displayed

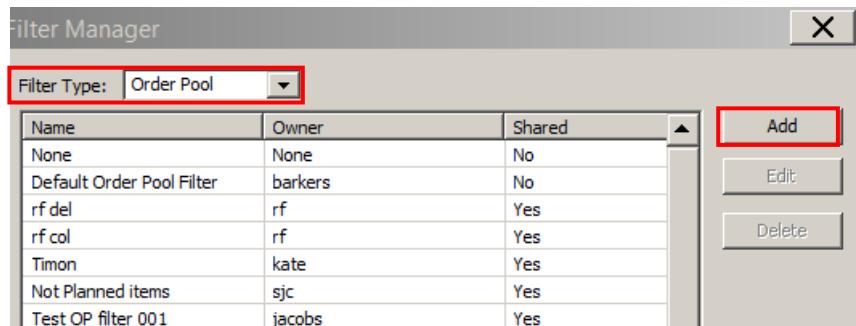


Figure 13

2. Filter Type, Select the type of window the filter will apply to (Order Pool, Traffic Sheet, Supplier Bin or Inbound)
3. Click **Add**

The Add New Filter window is displayed:

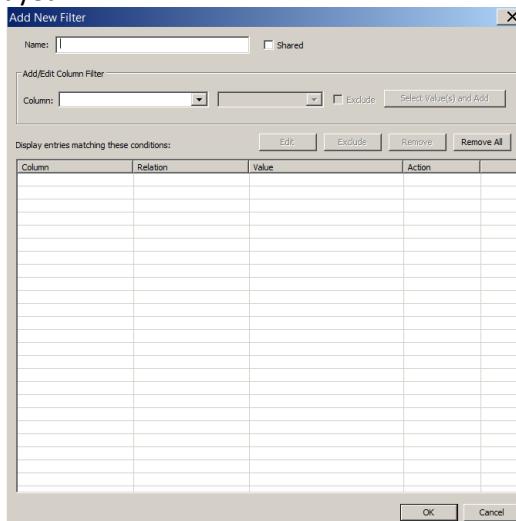
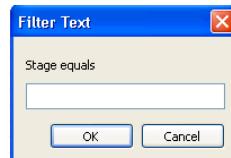


Figure 14

26. **Name**, Key in a name for the filter
27. **Shared** (will only be visible if the user has access to share filters) Select this option to Share the filter out to other ESP users
28. **Column**, select the column that the filter is going to relate to
29. Next Field, select either Equals, Does Not Equal, Begins with.... (the options displayed will depend upon the type of column selected)
30. **Exclude**, Select to exclude orders that match the criteria (leave deselected to include orders that match the criteria)
31. Click **Select Value(s) and Add** (This will be displayed if required and is dependent upon the criteria being used, for example, equals, does not Equal, begins with etc. all require a value)
32. *In this example the Column selected was a Text Column with the criteria of equals, the Filter Text window is displayed to add in the value.*



33. Key in the text to match (for example PL for PL Stage)

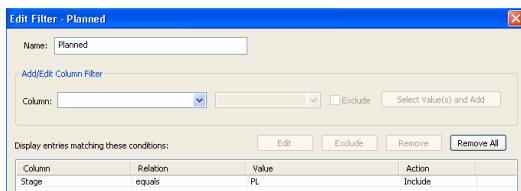


Figure 15

34. Click **OK**
35. Click **Close** to close the Filter Manager

Note: The Steps above can be repeated for another column to allow the filter to be expanded if required:

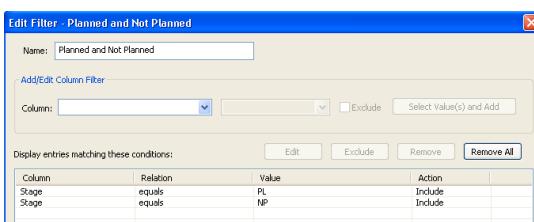


Figure 16

Deleting Filters

From the Filter Manager Window:

1. Select the filter to be deleted
2. Click **Delete**

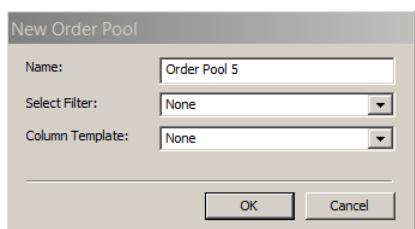
Note: when filters are created they will be owned by the user that creates them. Users can only delete filters they have created themselves.

Applying a Filter to a Window

Filters can be applied to a window when it is created (New Order Pool, Traffic Sheet, Supplier Bin, Inbound window) Filters can also be removed, applied at any stage when the window is open.

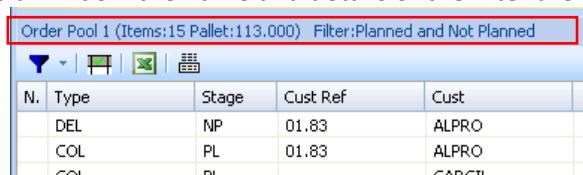
From the File Menu

1. Click New Order Pool (or Traffic Sheet, Supplier Bin, Inbound)



2. **Name**, Key in the name of the Order Pool
3. **Select Filter**, Select the Filter to apply
4. Click **OK**

Once a filter has been applied to a window the name and details of the filter are visible in the title bar:



N.	Type	Stage	Cust Ref	Cust
DEL	NP	01.83	ALPRO	
COL	PL	01.83	ALPRO	
COL	PL		CARGIL	

Figure 17

Amending Filters

Filters can be changed from within the filter manager, filters can also be changed/viewed after they have been applied to a window by clicking on the filter button.

From Filter Manager

1. Select the filter to be amended
2. Click Edit
3. Make changes/additions to the filter as required
4. Click OK

Amend a Filter applied to a window (Order Pool, Supplier Bin, Traffic Sheet, Inbound, Resource)

36. Locate the filter button at the top of the window

37. Click 

38. Make changes/additions to the filter as required

39. Click **OK**

Exclusion Filters

Exclusion filters can also be applied. By default, filters will be set to 'Include' the criteria set.

To create an Exclude filter:

1. When creating the Filter, Click the 'Exclude' Tick box

Alternatively:

1. If the filter has already been added, highlight the filter line and click the Exclude Tick Box, Click the Update Values and Update button
2. Click **OK**

In the example below, the **Exclude** filter on the Col Start column will display only legs that **are Not for Today**. If an **Include** filter was applied instead, only legs that **are For Today** would be displayed.

Display entries matching these conditions:			
Column	Relation	Value	Action
Col Start	today		Exclude

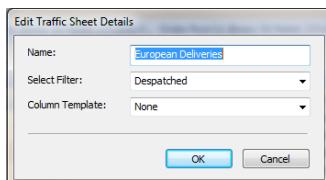
Replacing Filters

Once filters have been applied to a window they can be changed if necessary:

From the Window

1. Locate the filter button at the top of the window
2. Click on the Drop down arrow to the right of the button - 
3. Click **Replace Filter**

The Edit Details window is displayed:



4. **Select Filter**, Click on the Drop down Arrow and select the new filter to apply
5. Click **OK**

Title bar and Filters

The Title bar of the window (Order Pool, Traffic sheet etc.) displays the name of the filters that have been applied (Standard filters only not quick filters)

Order Pool 2 (Items: 0 Pallet: 0.000) Filter: AMBIENT DESPATCHES

View Templates

Once Filters and Column Templates have been setup, View Templates can be created. A View template is a combination of a column template and a filter. View Templates can be shared and applied to Order Pool, Traffic Sheet, Supplier Bin and Inbound windows.

Create, Change and Delete View Templates

Create a View Template

1. From the Menu:
2. Select Tools, Manage View Templates

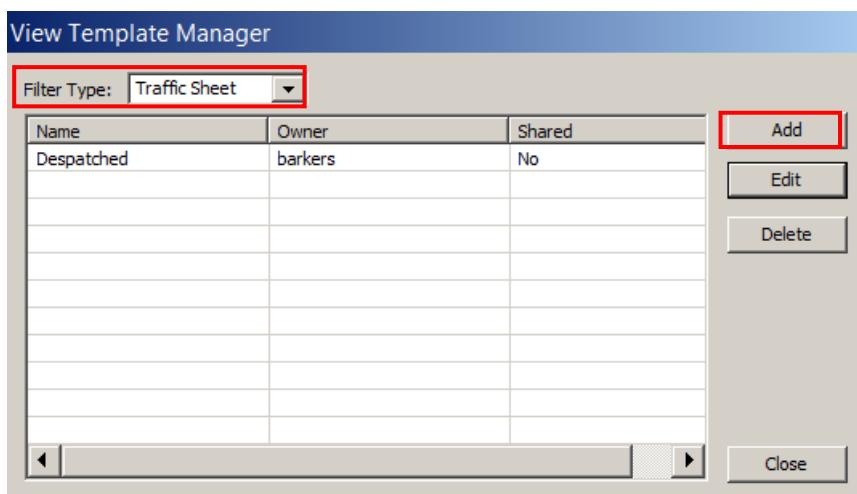


Figure 18

3. Select the Filter Type (Order Pool, Traffic Sheet , Supplier Bin or Inbound)

4. Click 

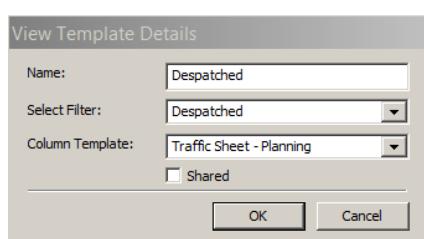


Figure 19

5. **Name**, Key in a Name for the Template
6. **Select Filter**, select a Filter from the drop down list
7. **Column Template**, Select a Template from the drop down list
8. **Shared**, Select to Share out the View if required
9. Click **OK**

Change or Delete a View Template

1. From the Menu:
2. Select Tools, Manage View Templates

To Change a Template

3. Select a Template Name from the list
4. Click **Edit**
5. Change the Template Name, Select a Different Filter or Column Template
6. Click **OK**

To Delete a Template

1. Select a Template Name from the list
2. Click **Delete**
3. Click **Yes** to Confirm Deletion

Apply View Templates

1. From the Order Pool, Traffic Sheet, Supplier Bin or Inbound Window
2. Select the **View** from the Toolbar



3. To Change the View, Select a Different View from the Toolbar

Remove a View from a Window

View templates can only be changed and not removed. The easiest way to remove a view from a window clear the filter using the Clear Filters button (see next section)

Removing All View Filters and Column Filters

The remove all filters button can be used to remove all filters applied using a views and quick filters.

Removing all Filters

From the Toolbar at the top of the Order Pool, Traffic Sheet or Supplier Bin:

1. Click the Clear Filter Button 

All filters will be reset (removed) from the window.

Order Pool

The Order Pool displays jobs that are at any status (Booked, Planned, Resourced, Despatched or Completed). The columns and column names displayed in all order Pools can be customized or rearranged to suit the needs of the user. Details of orders displayed in any Order Pool can be exported to Excel. Order Pools can also be moved, resized, docked or auto hidden. Details of the fields in the order pool are at the back of this guide in **Appendix A**.

- More than one order pool can be displayed
- Each Order Pool displayed can have different filters applied
- Usually – One Order pool will be filtered to display orders that are at NP (Not Planned) status this means that as loads are built the Order Pool will empty.

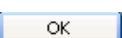
Display an Order Pool

From the Menu:

1. Click File, New Order Pool
2. The New Order Pool Dialog box is displayed:



Figure 20

3. **Name field**, key in a name for the Order Pool
4. **Select Filter field**, Select an existing filter or leave set to None to apply a filter at a later stage (see the filtering section for further details)
5. **Column Template**, Select an existing Template or leave set to None to apply a filter at a later stage
6. Click 

The Order Pool window will be displayed

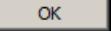
Order Pool 2 (Items: 2 Dolly: 14.000)																				
	Load Id	Cur Stage	Si	Depot	A	Sta	Job Number	Job Type	Customer Code	Shipper	Collection Description	Delivery Descrip	FD Address Descrip	Pallet	Dolly	Load No.	Tractor	Driver	Col Start	Del St
	238537	PL		AL		O	AL/0000002	ST	SRCUST	EAT	TESCO DIDCOT	TESCO DONCASTER	4.000	4.000		FL64 LYC		16/05/16 00:00	16/05/	
	238536	PL		AL		O	AL/0000003	ST	SBCUST	EAT	TESCO DIDCOT	TESCO DONCASTER	10.000	10.000				16/05/16 00:00	16/05/	

Figure 21

The Title bar of the Order pool displays the number of jobs in the window, Total pallet (sched1) count and indicates if a filter has been applied.

Change the Name of an Order Pool

Once an order pool has been created, the name can be changed if required:

1. From the toolbar at the top of the order pool window
2. Click on the Drop down arrow to the right of the Filter button - 
3. Click Change Name...
4. Key in the new name of the order pool and Click 

Information in the Order Pool

Loads

Each line in the order pool represents a job or a leg of a job. Jobs/Legs can be planned by dragging from the order pool onto the Gantt chart (this will create a load for the job). Alternatively loads can be built and resourced using the Load Manager. Once a job has been planned or assigned to a load, the Load will be visible in the Traffic Sheet.

Job Stage

Each Job or Leg in the order pool will be at one of the following stages (The descriptions and codes displayed can be changed/setup in ESP Admin):

NP	Not Planned	The Job has not been assigned to a load
PL	Planned	The Job has been assigned to a load but has not been Fully Resourced
RS	Resourced	The Job has been assigned to a load and has been Fully Resourced (Note: The Fully resourced setting is determined in ESP System Defaults and can be – Tractor only, Tractor & Trailer, Tractor & Driver or Tractor, Trailer and Driver)
DS	Despatched	The Job has been despatched
CO	Completed	The Job has been Completed

The Previous stage field will display the stage of the previous leg, if applicable. For example, if the leg is a trunk leg then the previous leg stage may be a collection that could have a stage of DS – Despatched. Equally the Next Leg Stage field will display the stage of the next leg. For example, if the leg is a trunk the next leg stage may be a delivery and could have a stage of NP – (Not planned)

Leg Types

Job Legs have a Leg Type assigned to them depending upon whether or not they are collections, deliveries, collect/deliver or trunks.

C&D	Collect Deliver	The Job is a Collect Deliver Job
COL	Collect	The Leg is a Local Collection being brought back into the depot
DEL	Delivery	The Leg is a Delivery Leg
TRK	Trunk	The Leg is Collecting From one Depot and delivering to another

Note: The Column descriptions are defined in ESP Admin.

Load Types

When Loads are created, they are assigned a unique load number, each load also has a load type which will be one of the following

C&D	Collect Deliver - The Load has a Collect and a Delivery Leg
TRUNK	The Load is Collecting from and Delivering to a Depot
CHANGEOVER	Changeover – Identifies a Changeover Load
SHIP/RAIL	Identifies a Ship/Rail Load (International)

GTS Job Status

Depending upon the Load Stage in ESP, each job will have one of the following Statuses in GTS:

- | | |
|----------|---|
| BK | - The Job is Not Resourced in ESP |
| PL/CS | - The Job is Planned and Resourced in ESP |
| CO | - The entire Job has been debriefed or completed in ESP |
| AU/RC/IN | <ul style="list-style-type: none"> - Indicates the load has been authorised for invoicing, Rate Confirmed or Invoiced. Loads that contain jobs at any of these stages are restricted. Details are in the Completed Jobs Section later in the guide. |

Order Pool Icons

Icons are displayed in the **Sts** Column in the order pool to indicate if an order has been booked in, locked or split into legs.

Icon	Description
	Open collection and delivery windows
	Order has been booked in or has a set collection or delivery window
	Collection leg
	Delivery leg
	Mid Leg or Trunk
	Order Locked for update
	Order pending refresh, another user has changed details but the order is available for update after refresh.

Order Pool 2 (Items: 3 Dolly: 24.000)										
	Load Id	Cur Stage	Si	Depot	A.	Sts	Job Number	Job Type	Customer Code	Shipper
	<call>		<call>				<call>		<call>	
	238527	PL		AL			AL/0000002	ST	SBCUST	EAT
	238526	PL		AL			AL/0000003	ST	SBCUST	EAT
		NP		AL			AL/0000003	ST	SBCUST	EAT

Figure 22

See Appendix C for a detailed list of all icons that are displayed in the ESP Order Pool.

Changes to Jobs

When Job details are changed the details are sent back through to GTS. Whilst this is happening, the job is locked. The icon is displayed to indicate this. The job cannot be updated until the update is complete. Once the update has completed, the leg will have a Load Alert visible in the Load Manager (See Alerts section)

Changes to Loads

When Load details are changed the changes are sent back through to GTS. Whilst a record is locked, the padlock icon is displayed. Changes to loads may trigger alerts, details of alerts are visible in the Load Manager.

Order Pools - Jobs at NP Status and Loads

Jobs at all stages can be displayed in the Order Pool. Once a load has been created, the planning status will be PL and the Load will be visible in the Traffic Sheet. Filtering can be used to only show jobs that are at NP status (Not Planned) in the Order Pool, this means that as jobs are put into loads the jobs will no longer be visible in the Order Pool.

Additional Functions available from the Order Pool

The following functions are available from the order pool and are covered in the relevant sections later in this guide.

Reports	Pre-Book Collection/Delivery
Create Loads	Un-Book Collection/Delivery
Route Via	Allocate to Supplier
Create Collection Leg/Merge Delivery Leg/Create Trunk Leg	Find in Chart
Identify Jobs	Search for legs of Job
Resourcing	Change Job
Transfer Jobs	Cancel Job
Undo Jobs Transfer	Change Name
Add Customer Service Issue	Audit
Properties	Show as Gantt
Special Instructions	Route Via Ship/Rail (International)
Find Available Loads	Returns
Split (Chilled)	Set Collected/Ordered Qty (Chilled)

The contents of the Order Pool can also be exported to Excel by Clicking



Job Properties

Each Job has a properties window, the properties (Job Details) window displays details of the Job, Information is arranged in a series of tabs - see (Figure 23) below.

Viewing Job Details (Properties)

From the Load Manager or Order Pool

1. Right Click on a Job
2. Select **Properties**

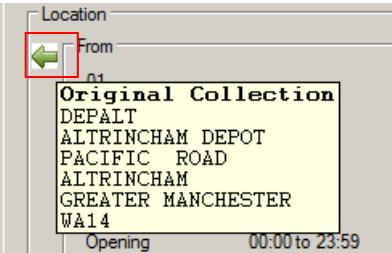
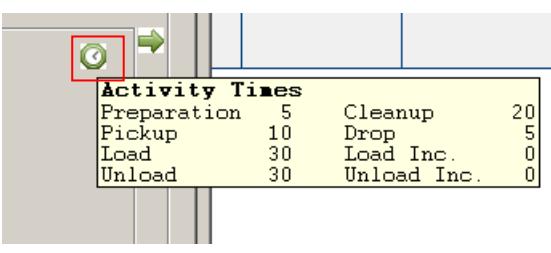
The Job Details window is displayed:

<div style="border: 1px solid #ccc; padding: 5px;"> <h4>General</h4> <p>View Job Details - BA/0002086</p> <p>General Book Collection Book Delivery Commodities Special Instructions Special Requirements Container Details Additional Charges</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> General <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Job Number BA/0002086</td> <td>Customer Code SB</td> </tr> <tr> <td>Shipper SB</td> <td>Name SBCUST</td> </tr> <tr> <td>Temp Cat AMB</td> <td>Reference</td> </tr> <tr> <td>Type 01</td> <td>Booking</td> </tr> <tr> <td>Tractor Type 38T</td> <td>Collection</td> </tr> <tr> <td>Revenue 0.00</td> <td>Delivery</td> </tr> <tr> <td>Trailer Type</td> <td></td> </tr> </table> </td> <td style="width: 50%;"> Location <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>From ABCCHE ABC CHESTER CHESTER CHESHIRE CH5 4GF Geographic Id: 48 Tel: 0101 4454545</td> <td>To BRDL07 BRDL07 BS8 BRISTOL UNIVERSITY OF BRISTOL CANTOCKS CLOSE, CLIFTON BS8 1UP Geographic Id: 185</td> </tr> <tr> <td>Opening 00:00 to 23:59</td> <td>Opening 00:00 to 23:59</td> </tr> <tr> <td>Collection Window From 08/06/16 00:00</td> <td>Delivery Window From 08/06/16 00:00</td> </tr> <tr> <td>To 08/06/16 23:59</td> <td>To 08/06/16 23:59</td> </tr> </table> </td> </tr> </table> <p>Previous Next OK Cancel Apply</p> </div>	General <table border="1" style="width: 100%; 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Figure 23

Job Details

General Tab	Displays details including Job No, Customer Code, References, Job Type and Revenue Further details for Original Collection/Final Delivery  (if applicable) and  Activity time are also available by moving the mouse pointer over the relevant icons:
	 
Book Collection/Delivery Tab	Displays the Booked Collection/Delivery Date and Time windows, references and Contact details from GTS
Commodities Tab	Details of the Commodities for the job
Special Instructions Tab	Details of Special Instructions for the job
Additional Charges	Fuel Charges and other Additional Charges entered in GTS are displayed on this tab
Container Details	Visible if switched on in ESP Config
Special Requirements	If the order has special requirements the details will be visible on this tab (config setting enables)
Special Instructions	If the order has special instructions the details will be visible on this tab
Container Details	Details of restitution points and VBS/Seal numbers are displayed on this tab

Special Instructions

Special Instructions are displayed in the following windows:

Order Pool/Traffic Sheet

 displayed in the SI column indicates Special instructions. Hover the mouse pointer over the icon to see details of the special instruction text. Alternatively, right click on the order and select special instructions to view the details

Order Pool

Right Click on any Single leg and Click **Special Instructions** to view the special instructions

Job Properties

Access the **Job Properties** for any leg from the Load Manager, Click on the **Special instructions Tab** to view the details

Gantt Chart

Loads on the Gantt with Special instruction icon display the special instructions icon  To see the special instructions: Hover the mouse pointer over the Load. Alternatively, Right Click on the Job on the Gantt, Click **Open Load Manager**, Right Click on the job, Click **Properties** then Click special Instructions

Special Requirements

Orders with Special requirements are identified in the order pool by the icon in the Special Requirements. Special requirements are used to identify resource requirements for a Load. Further Details on Special Requirements are available in the Alerts and Overrides section in this guide.



Figure 24

Details of the Special requirement for the Job are visible by hovering the mouse pointer over the column in the order pool or traffic sheet. Full details can also be displayed from Job Properties:

Job Properties

1. From Order Pool or Load Manager (see next section)
2. Right Click on the Job
3. Click on Properties
4. Click on the **Special Requirements Tab** to view the details

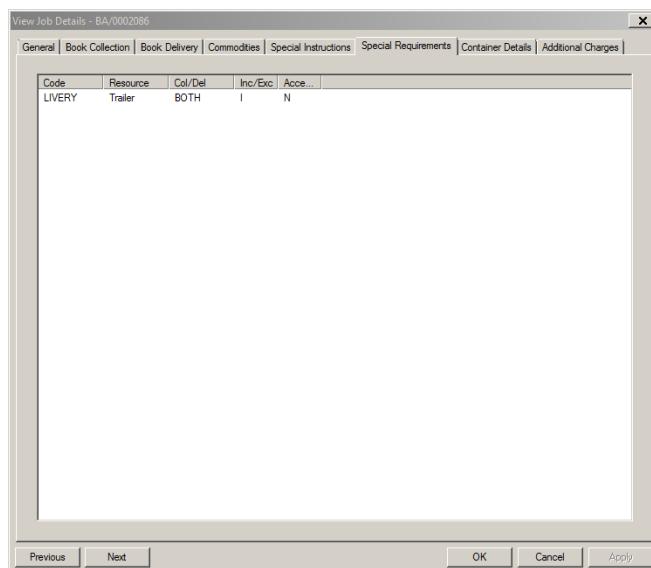


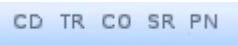
Figure 25

Load Manager

The Load Manager is used to build loads. When the load is created, a load start date and time is entered, the Load can also be created as a collect/deliver (cd) trunk or changeover load. Once the Load has been created Load Manager can be used to re-sequence legs or resource the Load. Empty Loads can also be created either from the Traffic sheet or as a result of creating a load and then removing all the legs. Empty Loads can also be created with empty stops (Shell)

Create a Load

Create Loads from the **Order Pool**:

1. Locate the Job(s)
 2. select the job and click one of the create load buttons on the order pool toolbar: 
- The buttons visible are CD, Create a Collect Deliver load, TR Create a trunk load, CO Create a changeover load, SR create a ship/rail leg and PN create a pallet network load.
3. The load will now be visible on the traffic sheet
 4. Alternatively, Right Click on the Job(s)
 5. Select Create Load As
 6. Select the Load Type either, Collect/Deliver, Trunk or Changeover (Ship/Rail is covered in the international guide)

The following example is using the Collect/Deliver Load Type, Trunks and Changeovers are covered later in this guide.

The Create New Load Dialog is displayed:

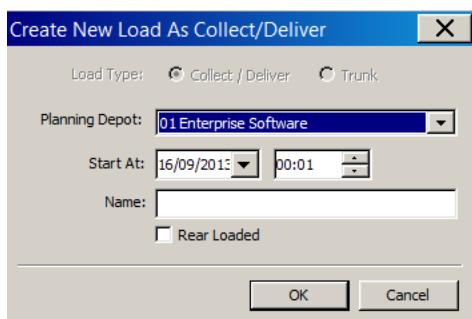


Figure 26

7. Planning Depot - displays the default planning depot. If logged in to multiple depots this field will be available and allow the user to change the Depot responsible for planning the load
8. Destination Depot - Select the Destination depot (enabled and applicable to Trunks only)

Note :The following two options **Trip** and **Category** will only be visible if configured and switched on in ESP system Defaults:

1. Trip, Select the Trip type from the drop down list
2. Category, Select the Category from the drop down list.
3. Start At, Select the Start Date and time for the Start of the Load.

Note: If the time entered conflicts with the Collection or Delivery window from the job(s) an error/alert will be displayed in the load manager window.

4. Name, key in a name for the load if required

Note: The following option is only relevant if the international module is switched on in ESP

5. Rear Loaded, specify that the trailer is going to be rear loaded for unloading after the ship/rail leg (International ESP)
6. Click OK

The Load manager window will be displayed (the Load will also be visible on the Traffic Sheet)

Load Manager Window

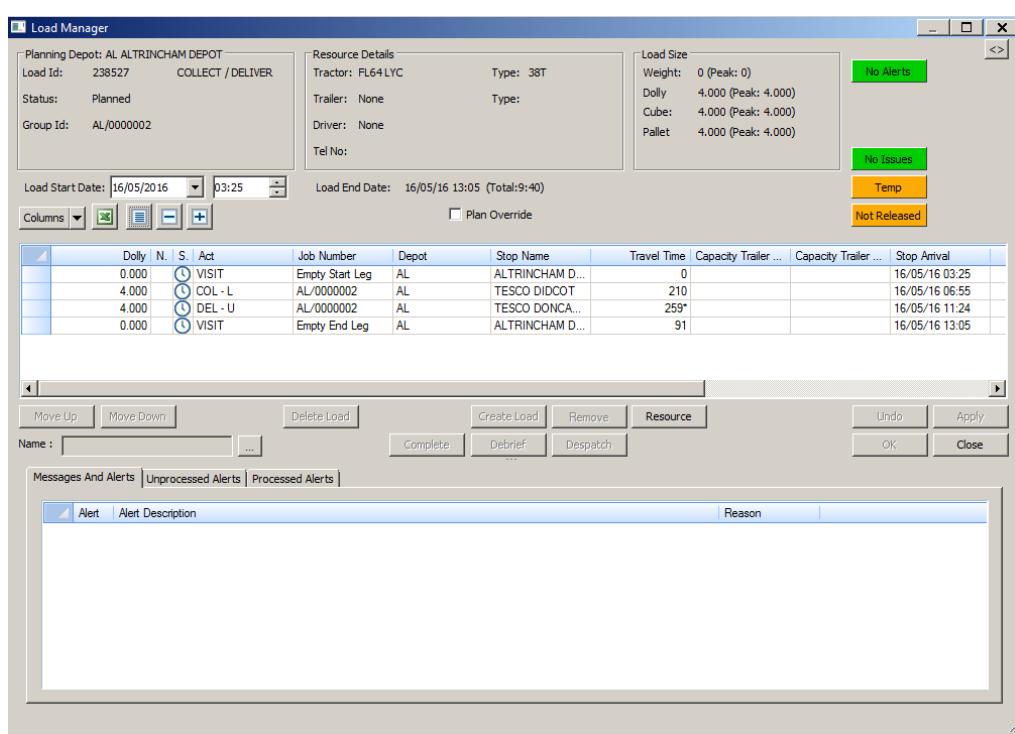


Figure 27

Header

The Load Manager Header displays the Load Number, Type of Load, Status of the Load, Load Start Date and Time and also the Load End Date Time and Duration. Details of Resources applied are also visible. The Load Size displays the Weight, Schedule1, Cube and Schedule2 for the Load. The Peak Figure is the highest amount on the load during the route.

Alerts/Issues/Overrides

The top right-hand corner of the Load Manager displays details of Load Alerts, Load Issues and Load Overrides. For further details see the relevant sections later in this guide.

Load Section

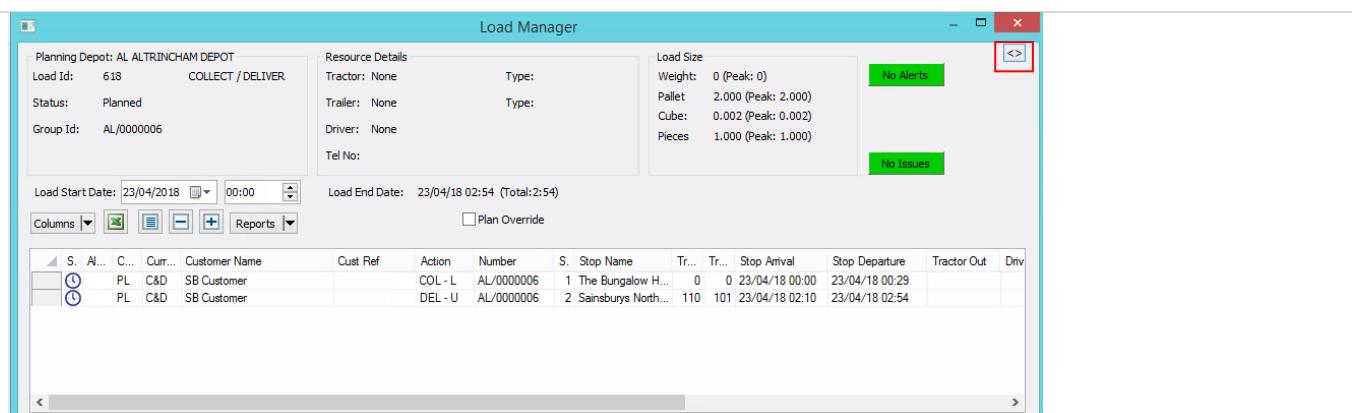
The central Load section displays columns of information for each Job. The Group button  can be used to display jobs in group view. The Collapse and Expand buttons   can be used in Group view to show or hide details at each stop. (See section on Group View)

The contents of the load manager can also be exported to Excel by Clicking 

Load Manager Expansion View & resize alerts area

The Load manager can be expanded to show stop information only on a load. Click the expansion button in the load manager to toggle off or on expansion view:

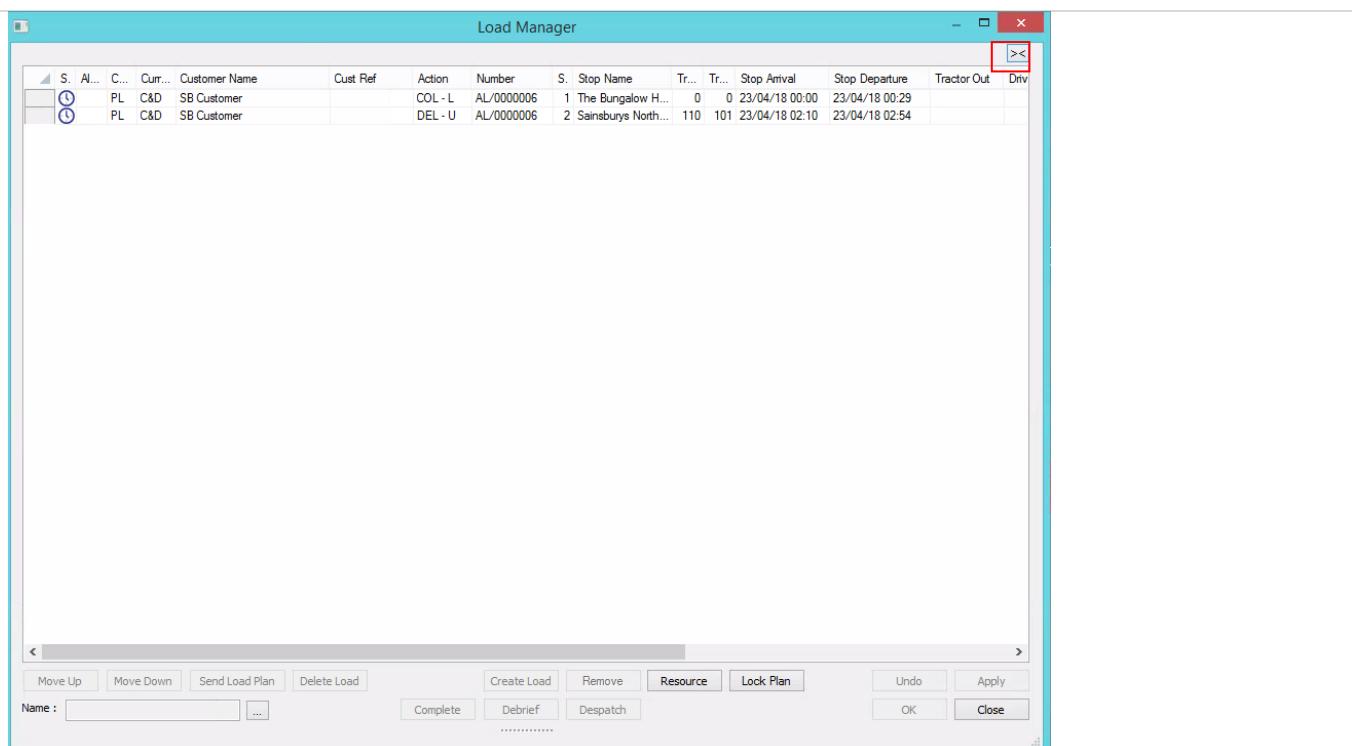
Before Expansion View



The screenshot shows the Load Manager interface with the following details:

- Planning Depot:** AL ALTRINCHAM DEPOT
- Load Id:** 618 **COLLECT / DELIVER**
- Status:** Planned
- Group Id:** AL/0000006
- Resource Details:** Tractor: None, Type: None; Trailer: None, Type: None; Driver: None
- Load Size:** Weight: 0 (Peak: 0); Pallet: 2.000 (Peak: 2.000); Cube: 0.002 (Peak: 0.002); Pieces: 1.000 (Peak: 1.000)
- Alerts:** No Alerts
- Issues:** No Issues
- Buttons:** Columns, Reports, Plan Override, and a button with a double arrow () which is highlighted with a red box.
- Table:** Shows two rows of stops. Row 1: S. Al... (1), PL (C&D), Curr... (SB Customer), Cust Ref (COL - L), Action (AL/0000006), Number (1), Stop Name (The Bungalow H...), Tr... (0), Tr... (0), Stop Arrival (23/04/18 00:00), Stop Departure (23/04/18 00:29), Tractor Out, Driver. Row 2: S. Al... (2), PL (C&D), Curr... (SB Customer), Cust Ref (DEL - U), Action (AL/0000006), Number (2), Stop Name (Sainsburys North...), Tr... (110), Tr... (101), Stop Arrival (23/04/18 02:10), Stop Departure (23/04/18 02:54), Tractor Out, Driver.

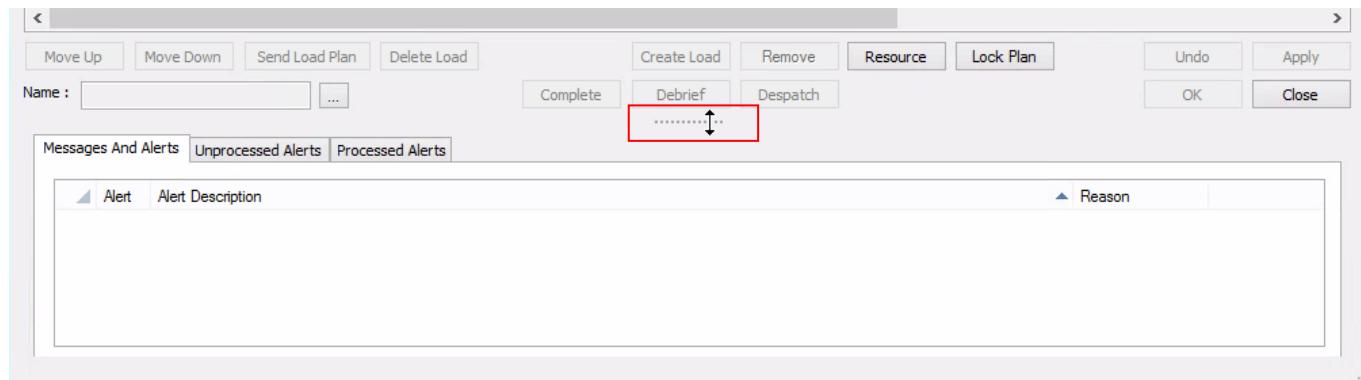
After Clicking the expansion view button



The screenshot shows the Load Manager interface after expanding the view, with the following details:

- Planning Depot:** AL ALTRINCHAM DEPOT
- Load Id:** 618 **COLLECT / DELIVER**
- Status:** Planned
- Group Id:** AL/0000006
- Resource Details:** Tractor: None, Type: None; Trailer: None, Type: None; Driver: None
- Load Size:** Weight: 0 (Peak: 0); Pallet: 2.000 (Peak: 2.000); Cube: 0.002 (Peak: 0.002); Pieces: 1.000 (Peak: 1.000)
- Alerts:** No Alerts
- Issues:** No Issues
- Buttons:** Columns, Reports, Plan Override, and a button with a double arrow () which is highlighted with a red box.
- Table:** Shows two rows of stops. Row 1: S. Al... (1), PL (C&D), Curr... (SB Customer), Cust Ref (COL - L), Action (AL/0000006), Number (1), Stop Name (The Bungalow H...), Tr... (0), Tr... (0), Stop Arrival (23/04/18 00:00), Stop Departure (23/04/18 00:29), Tractor Out, Driver. Row 2: S. Al... (2), PL (C&D), Curr... (SB Customer), Cust Ref (DEL - U), Action (AL/0000006), Number (2), Stop Name (Sainsburys North...), Tr... (110), Tr... (101), Stop Arrival (23/04/18 02:10), Stop Departure (23/04/18 02:54), Tractor Out, Driver.

The resize function enables the alerts section of the load manager window to be expanded.



Functions available from the Load Manager

The following functions can be performed by clicking on the relevant button in the Load Manager:

Create Load	Select Jobs in the load manager window and create another load for those jobs
Remove	Select a Job and Click Remove to remove the job from the load
Resource	Click the Resource button to apply or change Tractor/Driver or Trailer Resource
Complete	Click the Complete button to change the load status to complete (The debrief function is the preferred method of completing jobs and this option will only be available if the relevant permission has been granted to the user)
Un-complete	Available if switched on in ESP System Defaults
Debrief	Click the debrief button to view actual times recorded and to record driver debrief information
Despatch/Undespatch	Once the load has been fully resourced the despatch button becomes available to record details of the despatch time and trailer. Users with permission will also see an undespatch button to undespatch a load once it has been despatched.
Move Up/Move Down	Select to change the order of collection or delivery legs in the load
Name	Available to give the load a name, this will be visible in the order pool or traffic sheet providing the name column is displayed.
Delete Load	Select this option to delete the load (not available if the load has been despatched, however the load can be undespatched if required to enable this function)

Note: The Columns displayed in the Load Manager can be saved as a column template and set as default – see previous section on column templates and defaults.

Adding Jobs to the Load

1. From the Open Load Manager Window,
2. Locate the Jobs in the Order Pool that need adding to the load
3. Select the Jobs(s)
4. Drag and Drop the Jobs(s) into the Load Manager Window
5. Choose the relevant Merge Option:



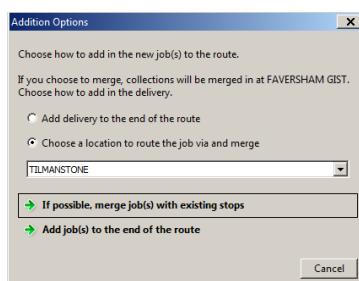
6. Select to either 'Merge Like Activities' (Merge Like Collections and Deliveries) alternatively, select to 'Add Order to the End of the Load.'

Load before Merge					Load After Merge Like Activities					Load with Add Order to End of Load							
Job Number	Act	Stop	Stop Name	Stop Arrival	Stop Departure	Job Number	Act	Stop	Stop Name	Stop Arrival	Stop Departure	Job Number	Act	Stop	Stop Name	Stop Arrival	Stop Departure
SP/0002540	COL - L	1	ABC BOSTON	30/08/12 00:01	30/08/12 00:11	SP/0002540	COL - L	1	ABC BOSTON	30/08/12 00:01	30/08/12 00:11	SP/0002540	COL - L	1	ABC BOSTON	30/08/12 00:01	30/08/12 00:11
SP/0002541	COL - L	1	ABC BOSTON	30/08/12 00:01	30/08/12 00:11	SP/0002541	COL - L	1	ABC BOSTON	30/08/12 00:01	30/08/12 00:11	SP/0002541	COL - L	1	ABC BOSTON	30/08/12 00:01	30/08/12 00:11
SP/0002540	DEL - U	2	ABC LINCOLN	30/08/12 01:10	30/08/12 01:15	SP/0002540	DEL - U	2	ABC LINCOLN	30/08/12 01:10	30/08/12 01:15	SP/0002540	DEL - U	2	ABC LINCOLN	30/08/12 01:10	30/08/12 01:15
SP/0002541	DEL - U	3	ABC WAKEFIELD	30/08/12 02:40	30/08/12 02:45	SP/0002534	DEL - U	3	ABC WAKEFIELD	30/08/12 02:40	30/08/12 02:45	SP/0002534	COL - L	4	ABC BOSTON	30/08/12 05:43	30/08/12 05:53
						SP/0002541	DEL - U	3	ABC WAKEFIELD	30/08/12 02:40	30/08/12 02:45	SP/0002534	DEL - U	5	ABC LINCOLN	30/08/12 06:52	30/08/12 06:57

The Load will now include the additional jobs and will be visible in the Traffic Sheet.

Auto Create Route Via (Adding Jobs to a Load)

When jobs are dragged into loads, Route Vias can be created automatically. If the Collection location matches one of the stops on the load and the Delivery location of the Job doesn't match the Stops on the load: The Route via Additional Options window is displayed.



- The Delivery can be routed via existing stops on the load (ESP will only be able to do this if feasible)
- Or the Job can be added to the end of the load

The following scenarios are catered for:

From Location matches, but To Location does not match stops on the load

If the From Location on the order does match a Collection Stop location on the load, and the To Location on the order does not match a Delivery Stop location on the load, the additional options window will be displayed. This allows a new leg to be created routed via a delivery location on the load.

If the job leg can be routed via more than one location on the route, any of the delivery points can be selected as a route via.

From Location matches more than one Collection Stop on the load, but To Location does not match stops on the load

If there is more than one instance of a collection location on a load and the planned times of the stops are within the collection window for the dragged job leg, then the job leg will be merged into the earliest matching stop on the load, and the rules outlined above will be used to route the delivery via a location on the load.

Both from Location and To Location match stops on the load

If both the Collection location and the Delivery location on the dragged job leg match stops on the load, the standard merge window will be displayed.

From Location does not match stops on the load

If the collection location on the dragged job leg does not match any of the collection stops on the load, the only option will be to add the leg to the end of the load or cancel the allocation altogether.

To Create the Route via

1. From the Order Pool
2. Locate the job that needs adding to the load
3. Drag and drop the order into the load manager window
4. The Additional Options window is displayed

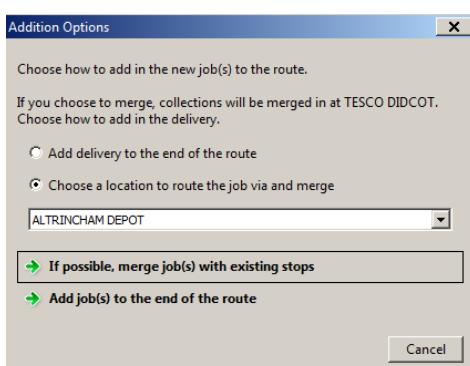
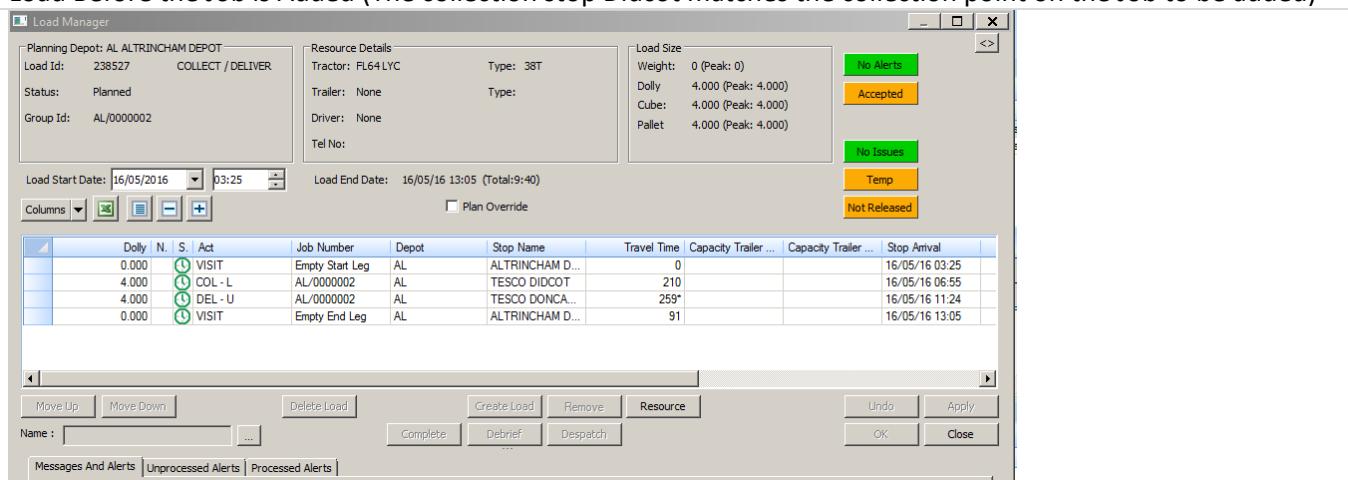


Figure 28

5. Select the location to route the job via and merge
6. The Job will be added to the load.

Load Before the Job is Added (The collection stop Didcot matches the collection point on the Job to be added)



Load Manager

Planning Depot: AL ALTRINCHAM DEPOT
Load Id: 238527 COLLECT / DELIVER
Status: Planned
Group Id: AL/000002

Resource Details
Tractor: FL64 LYC Type: 38T
Trailer: None Type:
Driver: None
Tel No:

Load Size
Weight: 0 (Peak: 0)
Dolly: 4.000 (Peak: 4.000)
Cube: 4.000 (Peak: 4.000)
Pallet: 4.000 (Peak: 4.000)

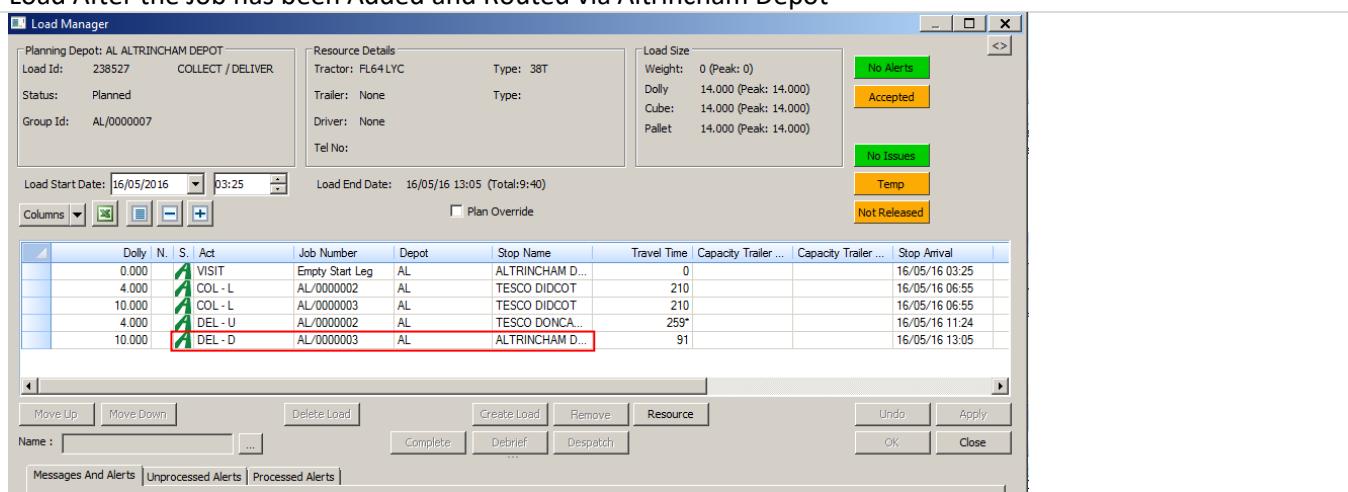
No Alerts
Accepted
No Issues
Temp
Not Released

Load Start Date: 16/05/2016 03:25 Load End Date: 16/05/16 13:05 (Total:9:40)
Columns Plan Override

Dolly	N.	S.	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival
0.000			VISIT	Empty Start Leg	AL	ALTRINCHAM D...	0			16/05/16 03:25
4.000			COL - L	AL/000002	AL	TESCO DIDCOT	210			16/05/16 06:55
4.000			DEL - U	AL/000002	AL	TESCO DONCA...	259*			16/05/16 11:24
0.000			VISIT	Empty End Leg	AL	ALTRINCHAM D...	91			16/05/16 13:05

Move Up Move Down Delete Load Create Load Remove Resource Undo Apply Name: OK Close Complete Debrief Despatch Messages And Alerts Unprocessed Alerts Processed Alerts

Load After the Job has been Added and Routed via Altrincham Depot



Load Manager

Planning Depot: AL ALTRINCHAM DEPOT
Load Id: 238527 COLLECT / DELIVER
Status: Planned
Group Id: AL/000007

Resource Details
Tractor: FL64 LYC Type: 38T
Trailer: None Type:
Driver: None
Tel No:

Load Size
Weight: 0 (Peak: 0)
Dolly: 14.000 (Peak: 14.000)
Cube: 14.000 (Peak: 14.000)
Pallet: 14.000 (Peak: 14.000)

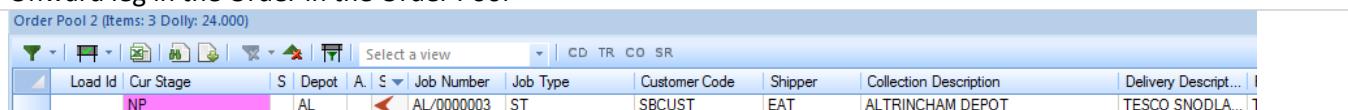
No Alerts
Accepted
No Issues
Temp
Not Released

Load Start Date: 16/05/2016 03:25 Load End Date: 16/05/16 13:05 (Total:9:40)
Columns Plan Override

Dolly	N.	S.	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival
0.000			VISIT	Empty Start Leg	AL	ALTRINCHAM D...	0			16/05/16 03:25
4.000			COL - L	AL/000002	AL	TESCO DIDCOT	210			16/05/16 06:55
10.000			COL - L	AL/000003	AL	TESCO DIDCOT	210			16/05/16 06:55
4.000			DEL - U	AL/000002	AL	TESCO DONCA...	259*			16/05/16 11:24
10.000			DEL - D	AL/000003	AL	ALTRINCHAM D...	91			16/05/16 13:05

Move Up Move Down Delete Load Create Load Remove Resource Undo Apply Name: OK Close Complete Debrief Despatch Messages And Alerts Unprocessed Alerts Processed Alerts

Onward leg in the Order in the Order Pool



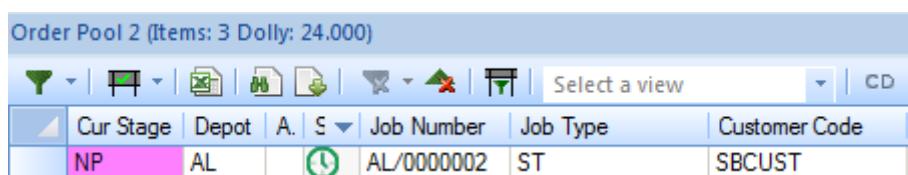
Order Pool 2 (Items: 3 Dolly: 24.000)

Load Id	Cur Stage	Depot	A.	S.	Job Number	Job Type	Customer Code	Shipper	Collection Description	Delivery Descript...
	NP	AL			AL/000003	ST	SBCUST	EAT	ALTRINCHAM DEPOT	TESCO SNODLA... 1

Removing Job(s) from a Load

- From the Open Load Manager Window
- Locate the Job(s) in the Load Manager that need removing from the load
- Select the Job(s) to be removed
- Click Remove

The Job will be placed back in the Order Pool, the Leg Stage will be NP:



Order Pool 2 (Items: 3 Dolly: 24.000)

Load Id	Cur Stage	Depot	A.	S.	Job Number	Job Type	Customer Code
	NP	AL			AL/000002	ST	SBCUST

Resequencing Jobs in a Load

1. From the Open Load Manager Window
2. Locate the Job(s) in the Load Manager that need re-sequencing
3. Drag and Drop the Jobs above/below each other to re- sequence the route
4. Alternatively, click on either Move Up or Move Down to re-sequence the Jobs

Amending the Start time of a Load

1. Change the Load Start Date and Time as required
2. Click the **Apply** button

Note: The Load end date and time and duration will be adjusted accordingly:

Original Load Start Time & End Time	Changed Load Start Time & End Time
Load Start Date: 30/08/2012 00:01 Load End Date: 30/08/12 06:57	Load Start Date: 30/08/2012 04:00 Load End Date: 30/08/12 10:56

Figure 29

Changing the Stop Activity (Load or Unload, Drop Off or Pick Up)

Activity Times at a Stop can be setup in the location master file in GTS, these times will be included in the stop time for the load. If the times aren't setup at location level GTS system defaults will be used instead. Different times can be setup for Pickup/Drop, Load or Unload. Changing the type of activity at a Stop will change the time included at the stop.

1. Right Click on the relevant stop in the load manager
2. Click Action, Select from either Load, Pick Up (Collections) or Unload, Drop Off (Deliveries)

The Action Column will now display an L for Load, P for Pickup, U for Unload or D for Drop off.

3. Click **Apply**

Changing the Load Name

From Load Manager Window

1. Click  by the side of Name
2. Key in the new Name in the Name field
3. Click **OK**

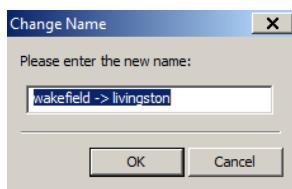


Figure 30

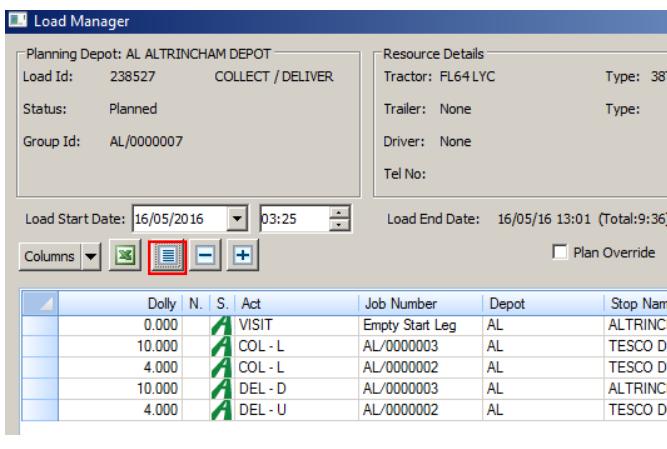
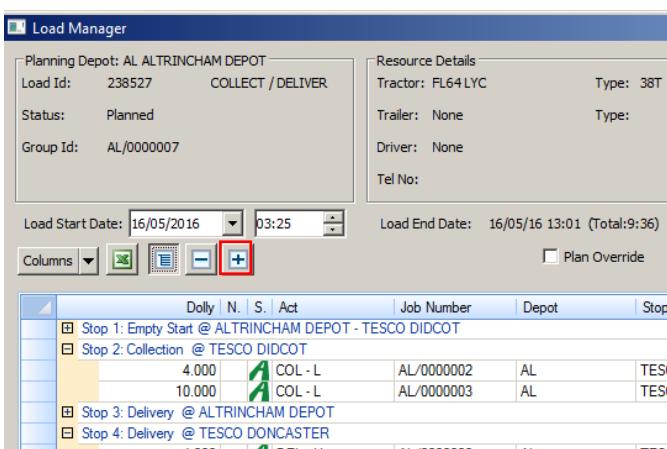
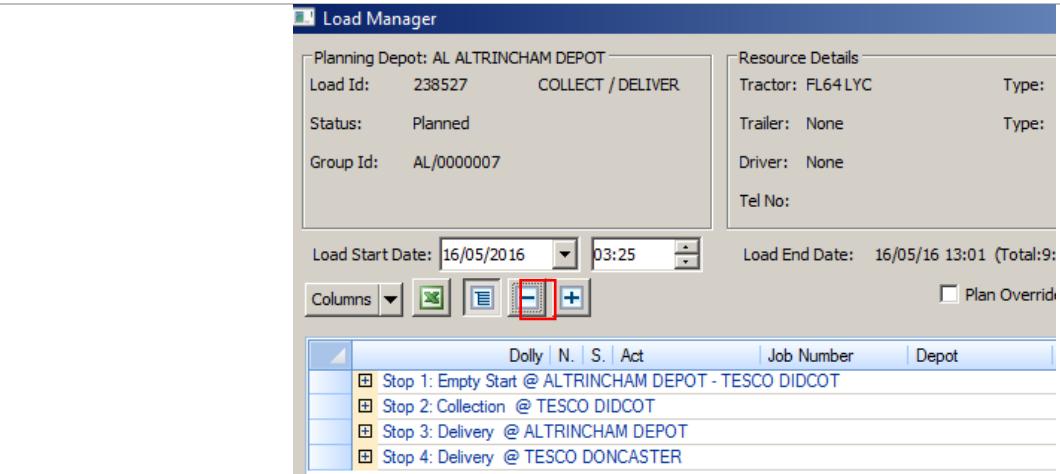
Load Manager Group View

Group View

The details displayed for jobs can be changed into a group view.

From the Load Manager:

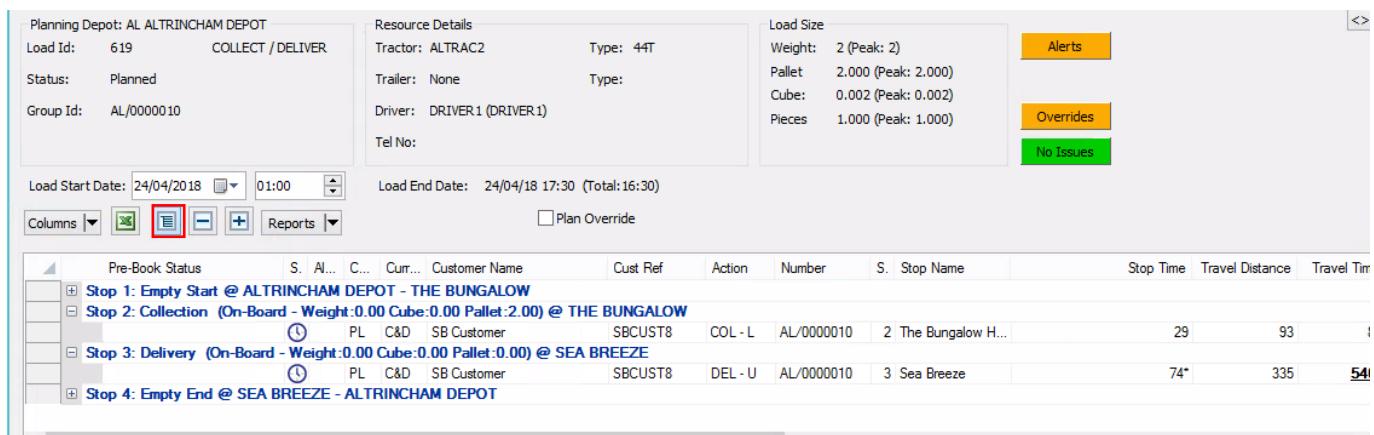
1. Click  (View as Grouped)
2. Click  or  to expand or collapse the details in Group view

Load Manager before Group View	Load Manager after Group View with stops expanded
	
Load Manager after Group View with Stops collapsed	
	

Customise Load Manager Group Heading

Changing the Load Manager Window Group Headings

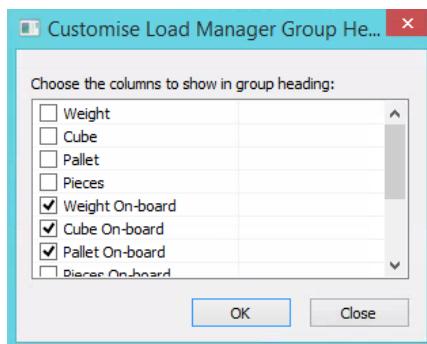
Fields displayed in the Grouped Header area of the Load Manager can be customised using the customise Group Header option. Group Headings need to be switched on in the load manager, these are enabled by clicking the group headings button (indicated in the screenshot below)



Pre-Book Status	S. Al...	C...	Curr...	Customer Name	Cust Ref	Action	Number	S. Stop Name	Stop Time	Travel Distance	Travel T...
Stop 1: Empty Start @ ALTRINCHAM DEPOT - THE BUNGALOW						COL - L	AL/0000010	2 The Bungalow H...	29	93	
Stop 2: Collection (On-Board - Weight:0.00 Cube:0.00 Pallet:2.00) @ THE BUNGALOW	(C)	PL	C&D	SB Customer	SBCUST8						
Stop 3: Delivery (On-Board - Weight:0.00 Cube:0.00 Pallet:0.00) @ SEA BREEZE	(C)	PL	C&D	SB Customer	SBCUST8	DEL - U	AL/0000010	3 Sea Breeze	74*	335	541
Stop 4: Empty End @ SEA BREEZE - ALTRINCHAM DEPOT											

From the Main Menu:

1. Click **Tools**, Customise Group Heading
2. Select from Weight, Cube, Schedule1 or Schedule2, Stop Arrival, Stop Departure, Shipper (Chilled) Night Out, On-board (outbound) values for weight, Cube, Sched1, Sched 2 as required
3. Click **OK**



Collapse own depot activity in Load Manager (Preferences)

Start and End legs from the depot can be collapsed or expanded automatically in Group view by setting the collapse option in user preferences

From the Main Menu:

1. Click **Tools**, Preferences
2. Select the tick box to collapse own depot activity in the load manager, deselect the tick box to expand the depot activity in the load manager

Traffic Sheet

The Traffic Sheet provides a central point for creating and managing loads. Loads are built using orders from the order pool. Details relating to Allocated Resources, Load Start Date and Load Status are also visible in the Traffic Sheet.

The Traffic sheet shows one line for each load, each Load is also assigned a unique load number.

Filters can be applied to the window if required and loads can also be sorted (see the section on Filtering and Sorting earlier in this guide)

The following loads will be visible in the traffic sheet:

- Loads consisting of more than one order that have been allocated to a vehicle on the Gantt
- Loads consisting of more than one order that have been routed but not yet allocated to a vehicle
- Single order loads that have not been allocated to a vehicle on the Gantt
- Single order loads that have been allocated to a vehicle on the Gantt
- Loads that have been allocated to a supplier
- New and empty loads that have been created within the traffic sheet
- Skeletal Loads

NOTE: The Following functions are also only available from the Traffic Sheet:

- Allocate Preferred Resources and Allocate to Preferred

Opening a Traffic Sheet

From the menu:

1. Click File, New Traffic Sheet

The New Traffic Sheet dialog is displayed:

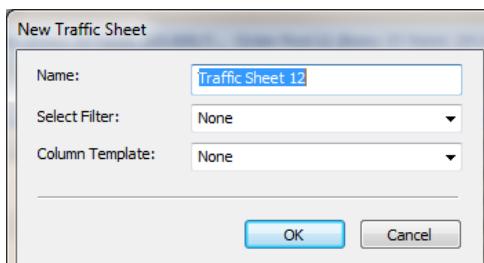


Figure 31

7. Name, Key in a Name for the Traffic Sheet
8. Select Filter, Select a Filter to apply to the traffic sheet (see the filtering section earlier in this guide for more details on how to create filters)
9. Click OK

The Traffic Sheet window will be displayed showing loads that match any filters that have been applied:

Traffic Sheet 12 (Items: 2 Dolly: 14.000) Filter: All Loads					
S.	A.	Depot	Load Name	Route	Start Load
		A	AL	C TESCO DIDCO...	16/05/16 03:25
			AL		16/05/16 09:02

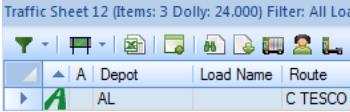
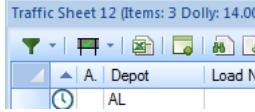
Figure 32

More than one traffic sheet can be opened following the steps above if required. For example, one Traffic Sheet may be required to display orders that are at Dispatched Status, another to show Orders that are Delivering to a specific customer's location. The name of any filters applied will be visible in the title bar area of the window.

Adding Jobs to a Load

From the Order Pool:

1. **Select** the jobs to be added to the Load
2. **Drag and drop** the jobs onto the Empty load on the Traffic Sheet
3. The Load symbol will now change to a Green Road (If more than one job is dragged onto the load) or a Clock/Red Arrow (if only one job/leg has been dragged onto the load)

Load in Traffic Sheet (multiple jobs)	Load in Traffic Sheet (1 Job)
Traffic Sheet 12 (Items: 3 Dolly: 24.000) Filter: All Loads 	Traffic Sheet 12 (Items: 3 Dolly: 14.000) 

Opening Loads from the Traffic Sheet

1. Locate the Load
2. Double Click on the Load to Open the Load Manager

Alternatively,

1. Right click on the load and select open load manager

Resourcing Loads from the Traffic Sheet

From the Traffic Sheet:

1. Right Click on the Load
2. Click **Resources**
3. Click Select **Allocated**
4. Resource the Load as required (For more information see the resourcing section)

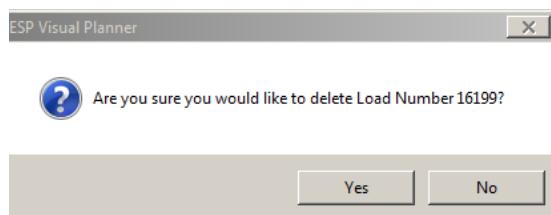
Alternatively;

1. Right Click on the Load
2. Select **Open Load Manager**
3. Click the **Resource** Button
4. Resource the Load as required (For more information see the resourcing section)

Deleting Loads

Loads can be deleted from the Traffic Sheet up to DS (Despatched) status. Once a Load has been despatched the Delete Load function will be greyed out (This function will also only be available to users that have the relevant permissions) The Load can be undespatched if required to allow the load to be deleted.

1. Right Click on the Load
2. Click **Delete Load**



3. Click **Yes**

Note: Empty loads can also be deleted from the **Load Manager** by clicking on the Delete Load button

Gantt Chart and Planned Loads

The Gantt Chart has four views, each displays loads in a different way. These are: **Combined**, **Block**, **Detail** and **Empty Running View**. Capacity Checking can be switched on, indicating on the Gantt if loads are near or over capacity. Resource Colours can be set to clearly indicate the resources applied on a route and Tooltips can be displayed to show details for each leg of the journey. The Route and Financial Information view windows display details of activities on legs and details of Costs, Revenue and Profit.

Changing Views

1. From the **Gantt** Toolbar
2. Click on the drop down arrow and select an option to switch between the views:

Block View	Combined View	Detail View	Empty Running View
Block View	Combined View	Detail View	Empty Running View

Combined and Detail View

Combined and Detail View display planned jobs as a series of colour coded blocks each representing an activity such as Collection, Delivery or Travel time. In addition ESP displays journey arrows for each leg of the job, each is coloured to indicate either, Empty Running, Full or Under Capacity. Tooltips can also be switched on to provide more information.



Colours/Secondary Resource Colours

The colours displayed for each block can be changed if required (see the customising section) This includes the line at the bottom of each block which indicates whether or not a Secondary Resource has been applied.

Block View

Block view displays each planned job as a single block, labels such as Last Delivery Town, Last Delivery Operational Description, Driver, Trailer can be displayed in block view.

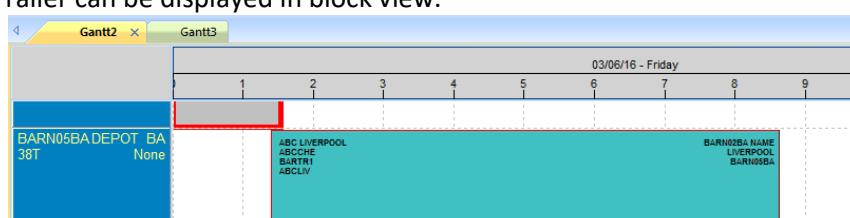


Figure 33

Figure 34

Figure 35

The example above (Figure 33) displays details of the delivery destination and the driver resource allocated to the job. The labels displayed in block view can be determined by the user also different colours can be set for Job Type (for more information see the customising Section)

Empty Running View

Empty Running view displays shading for empty running only for each load on the Gantt.

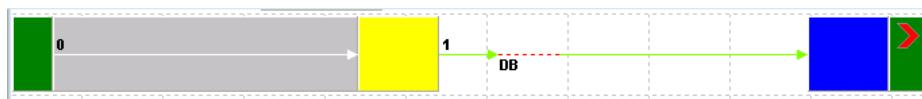


Figure 36

Tooltips

Rest the mouse pointer over any colour coded block on the Gantt to see tooltips for the following:

- Shift Start Time/Shift End Time & Duration
- Collection/Departure Locations, Planned and Actual Arrival/Departure Times, Travel Time, Delay Time, Distance, Secondary Resources for each Leg travelled (Figure 37)

Note: Tooltips will need to be enabled – See the Customising ESP section

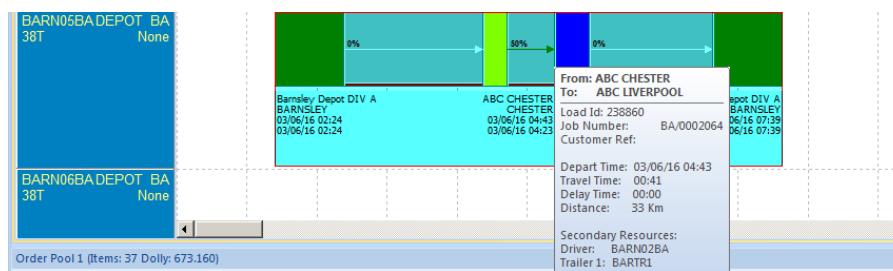


Figure 37

Capacity Details

Arrows and a loaded % are displayed on the Gantt to indicate if a leg of the Load is Empty, Full, Under or Severely under capacity (colours for these arrows and the labels (e.g. capacity percentage) displayed are customisable – see the customising ESP section for further information) In the example in Figure 37, the load is only 50% of the allocated trailer capacity (see the section on Capacity Checking)

ESP Legend

Once jobs have been planned on the Gantt the ESP legend can be displayed to show details of the coloured blocks, Travel time arrows and other symbols that represent each planned job

1. Click  to display the ESP Gantt Legend

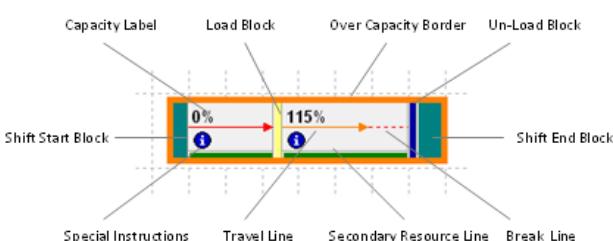


Figure 38

The Legend displayed will display any customised colours set

Route Information and Financial Information View

The Information View window displays information for each leg of the load. Two views are available, Route and Financial. These windows are populated when you move the mouse pointer over a load on the Gantt Chart.

From the ESP Menu:

1. Click Window from the Menu and select either Route Information View or Financial Information View

Route Information View				Financial Information View																									
Route Information <table border="1"> <thead> <tr> <th>Date</th><th>Action</th><th>Location</th><th>Job Number</th></tr> </thead> <tbody> <tr> <td>03/06/16 02:24</td><td>Start</td><td>Bamsley Depot</td><td></td></tr> <tr> <td>03/06/16 04:23</td><td>Collect</td><td>ABC CHESTER</td><td>BA/0002064</td></tr> <tr> <td>03/06/16 05:24</td><td>Deliver</td><td>ABC LIVERPOOL</td><td>BA/0002064</td></tr> <tr> <td>03/06/16 07:39</td><td>Home</td><td>Bamsley Depot</td><td></td></tr> </tbody> </table>				Date	Action	Location	Job Number	03/06/16 02:24	Start	Bamsley Depot		03/06/16 04:23	Collect	ABC CHESTER	BA/0002064	03/06/16 05:24	Deliver	ABC LIVERPOOL	BA/0002064	03/06/16 07:39	Home	Bamsley Depot		Financial Information <table border="1"> <tbody> <tr> <td>Total Cost</td><td>£ 1221.00</td></tr> <tr> <td>Total Revenue</td><td>£ 93.84</td></tr> </tbody> </table>		Total Cost	£ 1221.00	Total Revenue	£ 93.84
Date	Action	Location	Job Number																										
03/06/16 02:24	Start	Bamsley Depot																											
03/06/16 04:23	Collect	ABC CHESTER	BA/0002064																										
03/06/16 05:24	Deliver	ABC LIVERPOOL	BA/0002064																										
03/06/16 07:39	Home	Bamsley Depot																											
Total Cost	£ 1221.00																												
Total Revenue	£ 93.84																												

Figure 39

Move the mouse pointer over a load on the **Gantt** chart to see the information in the relevant window

Content View

The Content View window is used in conjunction with the Gantt. When the mouse pointer is moved over a point on the route the content view displays the jobs on board at that point.

From the Main ESP Menu

1. Click Window from the Menu and select Content View
2. Move the mouse pointer over the Gantt, the jobs on board will be displayed in Content View

Content View						
Customer	Customer Ref	Job Number	Collection	Del...	Weight (kg)	Cube (m3)
SBCUST	SB1.4	XD/0002125	Asda Lut...	As...	0	0.003
SBCUST	SB1.5	XD/0002112	Asda Lut...	As...	0	0.002
SBCUST	SB1.2	XD/0002109	Asda Lut...	As...	0	0.010

Empty Loads & Skeletal Routes

Creating Empty Loads

Empty Loads can be created from the traffic sheet. Jobs can then be dropped into the empty load from the order pool. In addition, stops can be added to an empty load creating a skeletal Route. Stops on skeletal routes can also be booked in.

From the Traffic Sheet Window:

1. Click 

The Create New Load window is displayed:

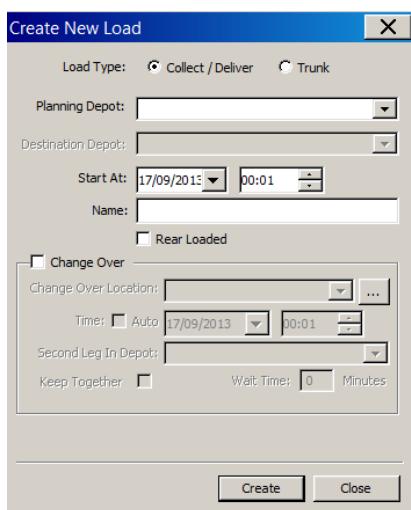
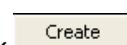


Figure 40

1. **Load Type**, Select Either Collect/Deliver or Trunk
2. **Planning Depot**, Select the Depot responsible for the planning of the load
3. **Destination Depot**, Select the Destination depot (available for Trunk Loads Only)
4. **Start At**, Key in the Load Start Date and Time
5. **Name**, Key in a Name for the load (not mandatory)

Select the following fields if the load is a changeover (for further details see the Changeover section later in this guide)

6. **Change Over**, Select this check box if this load is for a change over
7. **Change Over Location**, Select the changeover location from the drop down list
8. **Second leg in depot** – Select from the drop down list. (This is the depot that is responsible for the second leg)

9. Click 

Note: The Load number for the new load will be visible in the Create New Load Window (the window will remain open to create another load if required)

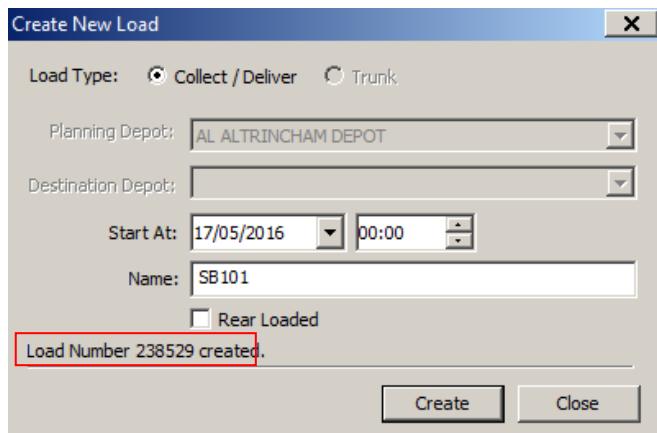


Figure 41

The New – ‘Empty’ load will now be visible in the Traffic Sheet:

Traffic Sheet 12 (Items: 4 Dolly: 24.000) Filter: All Loads				
	A	Depot	Load Name	Route
		AL	SB101	

Figure 42

Adding Stops to an Empty Load (Create a Skeletal Route)

Stops can be added to an empty load (empty shell) to represent Start Legs, End legs, Collections and Deliveries for a route. The route column in the traffic sheet displays the stops in the empty shell. Orders are then allocated to the skeletal load to populate the route. Once the skeletal has the first order allocated to the route, the load can be despatched if required.

1. Locate the Empty load in the Traffic Sheet
2. Right Click and select Open Load Manager
3. From the Open Load Manager:

Add Start Leg

1. Right Click in the empty load, Select Add Stop...
2. Select the Depot for the Start of the Load, Ensure the Stop Activity is set to Start, Click Add

Add Collection Leg

1. Click on the Location tab, Search for the location for the Collection, Select the Location

2. Ensure the Stop Activity is set to Collection
3. Capacity Trailer Type, select the Trailer type for the stop
4. Click Add

Add Delivery Leg

1. Click on the Location tab, Search for the location for the Delivery, Select the Location,
2. Ensure the Stop Activity is set to Delivery
3. Capacity Trailer Type, select the Trailer type for the stop
4. click Add

Add the End Leg

1. Click on the Depot Tab (or relevant tab for the end leg), Select the depot for the empty end leg
2. Ensure the Stop activity is set to End, click Add

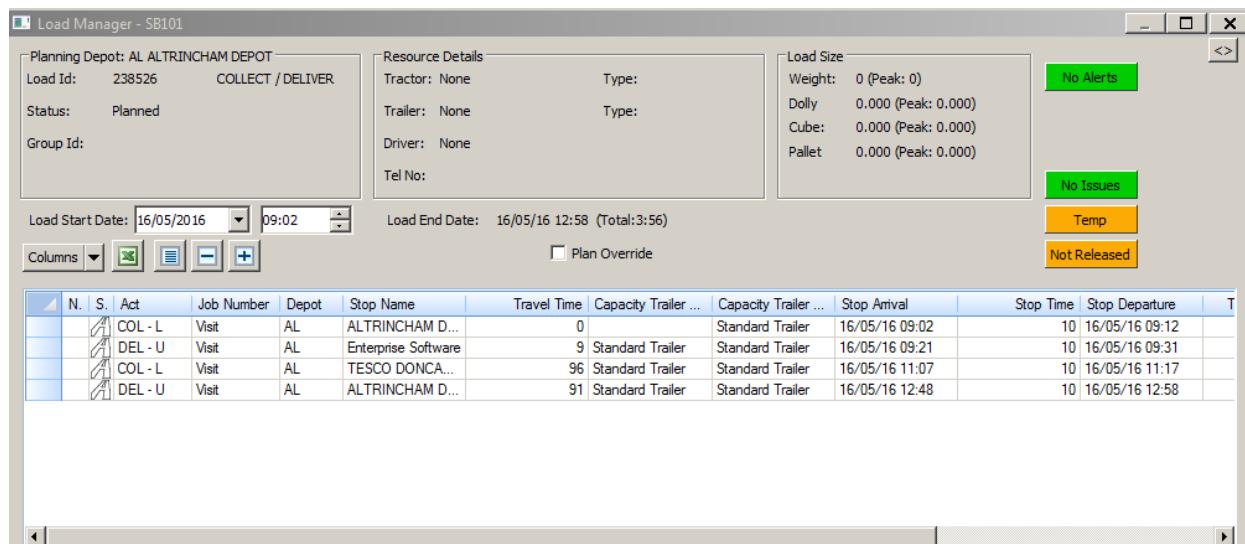
Confirm the Stops

1. Once all the stops have been added to the load Click Close
2. Note: to add further stops right click in the open load manager and click Add Stop..

To Remove a stop

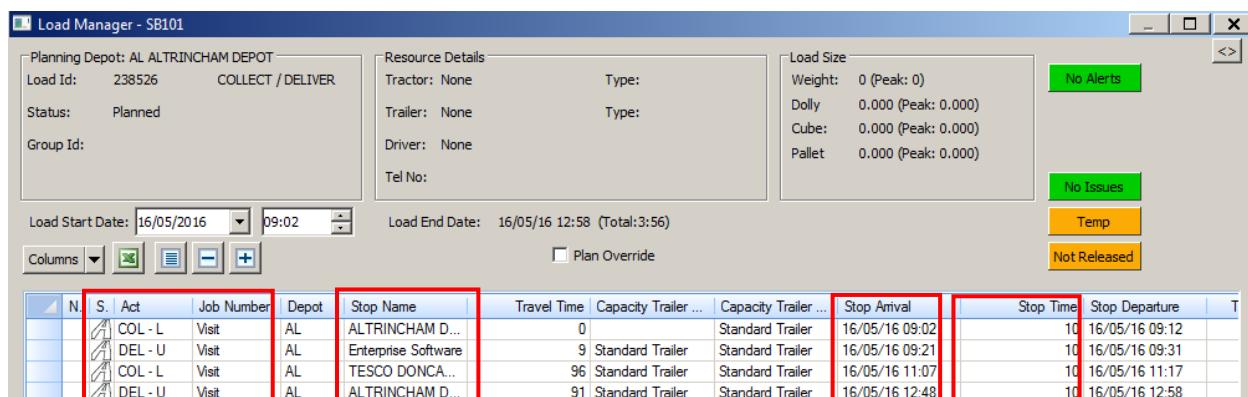
1. Right Click on the stop in the open load manager and click Remove stop.

Load Manager with stops added:



The screenshot shows the Load Manager interface for route SB101. The top section displays planning details: Planning Depot: AL ALTRINCHAM DEPOT, Load Id: 238526, Status: Planned, Group Id: None. Resource Details include Tractor: None, Type: None; Trailer: None, Type: None; Driver: None, Tel No: None. Load Size shows Weight: 0 (Peak: 0), Dolly: 0.000 (Peak: 0.000), Cube: 0.000 (Peak: 0.000), Pallet: 0.000 (Peak: 0.000). Alerts and Issues sections are empty. The main table lists four stops: Visit to ALTRINCHAM DEPOT at 09:02, Visit to Enterprise Software at 09:21, Visit to TESCO DONCA... at 11:07, and Visit to ALTRINCHAM DEPOT at 12:48. The table columns are N., S., Act, Job Number, Depot, Stop Name, Travel Time, Capacity Trailer..., Capacity Trailer..., Stop Arrival, Stop Time, Stop Departure, and T.

The Load manager displays the stop details for the route and Visits instead of Job Numbers:



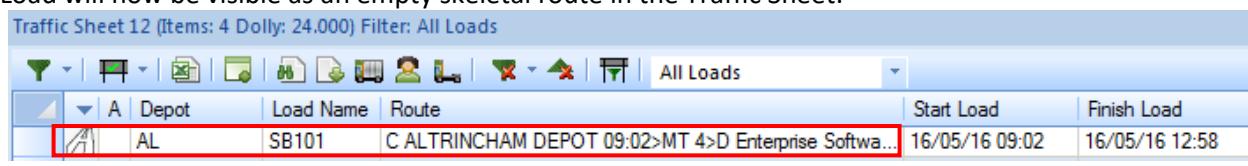
This screenshot is identical to the one above, but the columns for 'Stop Name' and the corresponding data rows are highlighted with red boxes. The 'Stop Name' column contains 'ALTRINCHAM D...', 'Enterprise Software', 'TESCO DONCA...', and 'ALTRINCHAM D...'. The 'Stop Arrival' and 'Stop Time' columns also have their first row highlighted with red boxes, showing '16/05/16 09:02' and '10' respectively.

Figure 43

Set the Load Start Date and Time

1. Check the Load Start Date and time are correct, adjust if necessary from the load manager window
2. Click the OK button to create the load

The Load will now be visible as an empty skeletal route in the Traffic Sheet:



The screenshot shows the Traffic Sheet 12 interface. The top bar displays 'Traffic Sheet 12 (Items: 4 Dolly: 24.000) Filter: All Loads'. The main table has columns: A, Depot, Load Name, Route, Start Load, and Finish Load. A single row is visible, highlighted with a red box, showing Depot: AL, Load Name: SB101, Route: C ALTRINCHAM DEPOT 09:02>MT 4>D Enterprise Softwa..., Start Load: 16/05/16 09:02, and Finish Load: 16/05/16 12:58.

Figure 44

The Following functions are available from a skeletal route:

- **Arrival and Departure times can be overridden**
Right Click on the Arrival or departure time in the load manager, Select Override and key in the new Time.
- **Travel times can be overridden**
Right Click on the **Travel time** in the load manager, Select **Override**, key in the new Time, Click **OK**
- **Booking in details can be recorded at a stop**
Right Click on the leg in the load manager, Select Pre-Book Delivery (For more details see the section on Booking in)
- **Nights out can be added to the shell**
- **The Default Action for a trailer at a stop can be changed**
Right Click on the stop in Load Manager, Select Action, Select from Unload, Drop Off, Load or Pickup (Different times for each activity can be set against the location master file in GTS)
- **Remove a Stop from a Load**
Right Click on the stop that needs to be removed, Click **Remove Stop**
- **Trailer Capacities can be set at Stop level**
Right Click on the stop and select Edit Capacity Trailer Type, Select the trailer type for the stop and click OK
- **Identify Jobs to Match is available**

Resourcing an Empty Load/Skeletal Route

From the Load Manager

1. Click the **Resource** button
2. Resource the Load as required with Tractor/Driver/Trailer (For more information see the resourcing section)

Adding Jobs to an Empty Load/Skeletal Route

From the Order Pool:

1. **Select** the jobs to be added to the Load
2. **Drag and drop** the jobs onto the Empty load/Skeletal on the Traffic Sheet

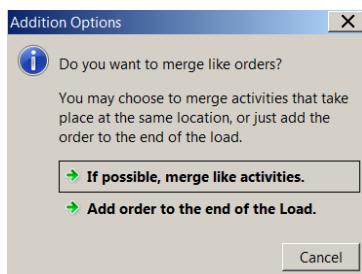


Figure 45

3. Select to either **Merge like activities** (to add the order to the relevant stop) or **add the order to the end of the load**

Once Jobs have been added to the shell the job numbers relevant to each stop will be visible in the load manager window. The Job Number column will either display 'visit' for stops that haven't been allocated a job or the 'Job Number' for those that have.

Job Number	Act	Stop
Empty Start Leg	VISIT	Kellogg
Visit	COL - L	A.F
T1/0002713	COL - L	A.F E
T1/0002713	DEL - U	A.F
Visit	DEL - U	A.F E
Empty End Leg	VISIT	Kellogg

Figure 46

The Load status symbol on the Traffic Sheet will change colour to indicate a job has been added to the empty load:

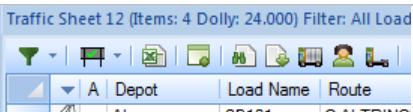
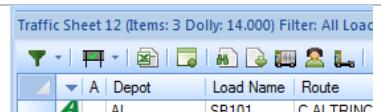
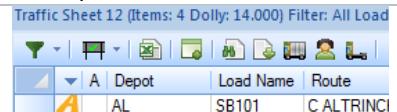
Routed Empty Load in Traffic Sheet	Load in Traffic Sheet (with all jobs added to the route)	Load in Traffic sheet (part allocated with Jobs for the route)
		

Figure 47

Copying Routes (skeletals)

Routes can be copied allowing skeletals to be created quickly, containing stops that match an existing route or skeletal.

From the Traffic Sheet:

1. Right Click on the load
2. Select Copy Route

The Load manager will open with the details of the copied route displayed.

The Load Audit will display details of the load number that was used to create the copied route.

Audit for Load 31

Stop	Event	Old Value	New Value	Changed Date	Changed
	Load Create	Load 31 copied from Load 24		13/06/16 17:37	barkers

Summary Detailed

Marking Loads as Not Required

Skeletal Routes can be marked as not required. Skeletals not required are protected in ESP and cannot have jobs dropped into the route.

From the Traffic Sheet:

1. Right Click on the load
2. Select The Load(s) not required option
3. Click Yes to confirm the load is no longer required

The load Status icon will display 

To Mark the load as required to enable the route to be used:

From the Traffic Sheet

1. Right Click on the load
2. Select Undo Load Not Required

The Load status icon will now display 

Resourcing Loads

Loads can have primary (Tractor) and secondary (Driver, Trailer, Equipment) resources applied from either the Traffic Sheet or the Order Pool. Once a primary resource has been applied, the load can have resources applied and changed from the Traffic Sheet, Order Pool or Gantt. Resources can also be pre-allocated. The loads can then be directly allocated to the resources from either the Traffic sheet or Order Pool.

Resource Loads from the Load Manager or Traffic Sheet

Locate the Load to be resourced on the Traffic Sheet

1. Right Click on the Load
2. Click Resources
3. Click on Select Allocated

Or, from the Load Manager:

4. Click the **Resource** button

The Select Resources Window is displayed:

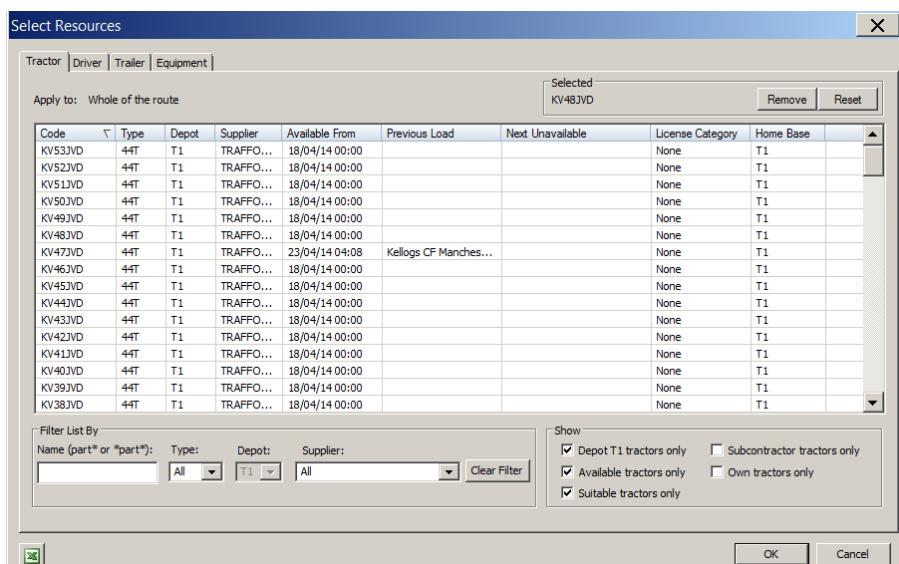


Figure 48

5. Select the relevant tab from the top left hand side of the window: Tractor, Driver, Trailer or Equipment
6. Click on the relevant Tractor, Driver and/or Trailer/Equipment for the load
7. Once all resources have been selected as required, Click OK

Applying Drivers/Trailers to different legs within a Load

From the Load Manager

1. Right Click on the Leg of the Load
2. Click Resources
3. Select from:
 - From this Stop to the Next Stop
 - From this Stop to the End of the Route
4. Select the relevant resources
5. Click **OK**

Note: The options available are dependent upon the leg selected for resourcing. If more than one driver is selected for different legs of the route the first driver is displayed in Load Manager with the word Multi*

Multiple Resources from the Load Manager	Multiple Resources from the Traffic Sheet
Driver: COLIN ANDREW *MULTI*	Driver BENTON *

Filtering Resources

Resources can be filtered either by Depot, Availability or Suitability (checks specific features of resources) or by Subcontract only

1. From the Resources window, select the relevant filter for Tractor, Driver or Trailer:

Tractor	Driver	Trailer
<p>Tractor Code:</p> <ul style="list-style-type: none"> • Key in part of the tractor code using * wildcard or key in the whole of the tractor code • e.g. *02 will result in SC02, AV02, 02AV codes being displayed <p><i>Alternatively:</i></p> <ul style="list-style-type: none"> • Select a Tractor Type or leave set to All <p>And/or</p> <ul style="list-style-type: none"> • Select a Depot (depends on level of access) <p>And/or</p> <ul style="list-style-type: none"> • Select a Supplier <p>And/or</p> <ul style="list-style-type: none"> • Select a Resource Pool 	<p>Driver Name:</p> <ul style="list-style-type: none"> • Key in part of the Driver name using * wildcard or key in the whole of the Driver name • e.g. *How* will result in Bob Howe, Bobby Howarth codes being displayed <p><i>And/or</i></p> <ul style="list-style-type: none"> • Select a Depot (depends on level of access) <p><i>And/or</i></p> <ul style="list-style-type: none"> • Select a Supplier <p><i>And/or</i></p> <ul style="list-style-type: none"> • Select a Resource Pool 	<p>Trailer Code:</p> <ul style="list-style-type: none"> • Key in part of the Trailer code using * wildcard or key in the whole of the trailer code • e.g. *02 will result in SC02, AV02, 02AV codes being displayed <p><i>Alternatively:</i></p> <ul style="list-style-type: none"> • Select a Trailer Type or leave set to All <p>And/or</p> <ul style="list-style-type: none"> • Select a Depot (depends on level of access) <p>And/or</p> <ul style="list-style-type: none"> • Select a Supplier <p>And/or</p> <ul style="list-style-type: none"> • Select a Resource Pool

The resources will be filtered and displayed accordingly.

Select Resources				
<input checked="" type="radio"/> Tractor <input type="radio"/> Driver <input type="radio"/> Trailer				
Apply to: Whole of the route				
Code	Type	Depot	Supplier	
T1TR44	REFE	T1	TRAFFORD	
T1TR43	REFE	T1	TRAFFORD	
T1TR42	REFE	T1	TRAFFORD	
T1TR41	REFE	T1	TRAFFORD	
T1TR40	REFE	T1	TRAFFORD	
T1TR4	REFE	T1	TRAFFORD	

Figure 49

Information available from the Resources Window

The Resources window displays further details for each resource in the following columns:

Details	Description
Code	Details of the Code (GTS Master File) for the Tractor, Driver or Trailer
Home Base (Tractor Only)	Details of the Tractors home base (If applicable)
Controlling Depot	Details the Tractor Controlling depot
Type (Tractor and Trailer only)	Displays the Equipment type – Capacity details are held against this master file in GTS
Resource Pool	Displays the resource pool for the Tractor/Driver or Trailer (resource pools are setup in GTS)
Available from	Date and Time the resource is available from
Previous Load	Details of the Previous Load
Next Unavailable	Details of Tractor, Driver or Trailer/Equipment Unavailability (from the relevant Master File)
Licence Category (Tractor and Driver only)	Details of the Licence Category required for the Tractor Held by the Driver
Next Shift Start (Driver only)	Details the availability of the Next Shift Start Time for the driver (details can be recorded as part of debrief)
Last Shift (Driver only)	Y indicates this is the Last shift for the Driver
Weight (Trailer only)	Details the capacity of the Trailer
Cube (Trailer only)	Details the capacity of the Trailer
Pallet (Trailer only)	Details the capacity of the Trailer
Case (Trailer only)	Details the capacity of the Trailer

Green Highlighting in the Resources window

Green highlighting against a resource indicates that the previous load the resource was allocated to returned back to the depot. This is an indication that the resource is available and in the depot. This setting can be enabled or disabled in ESP Admin system defaults.

Select Resources

Tractor | Driver | Trailer |

Apply to: Whole of the route

Code	Type	Depot	Supplier	Available From	Previous Load
WEND03	44T	TR	Training Depot Runcorn	24/06/14 04:50	Alton Towers Resor...
WEND02	44T	TR	Training Depot Runcorn	22/06/14 00:00	
WEND01	44T	TR	Training Depot Runcorn	22/06/14 00:00	
TRRUN20	44T	TR	Training Depot Runcorn	24/06/14 03:31	Runcorn Depot, C&...
TRRUN19	44T	TR	Training Depot Runcorn	22/06/14 00:00	

Once a load is **fully** resourced (fully resourced requirement Tractor/Driver/Trailer is determined in ESP defaults) the Current Leg Stage and Load status will change from PL to RS

Order Pool

Traffic Sheet

Order Pool 2 (Items: 3 Dolly: 18.000)						Traffic Sheet 12 (Items: 4 Dolly: 18.000) Filter: All Loads					
Cur S...	Depot	A.	Sts	Job Number	Job Type	Customer Code	Ship				
RS	AL			AL/0000003	ST	SBCUST	EAT				

Load Status – Load Manager

Load Manager - SB101	
Planning Depot: AL ALTRINCHAM DEPOT	
Load Id:	238526 COLLECT / DELIVER
Status:	Resourced
Group Id:	AL/0000010

Removing Resources from a Load

Locate the Load on the Traffic Sheet or Gantt Chart

1. Right Click on the Load
2. Select Resources
3. Click **Remove All** (Select to Remove all Resources from the Load)
4. Click **Remove**, Then Select either **Tractor**, **Trailer** or **Driver** to remove individual resource
5. Click **Remove and Save All** (Select to Remove all Resources but save them as Preferred Resources – see next section on Allocating Preferred Resource to a Load)

Alternatively, from Load Manager;

1. Click the **Resources** Button
2. Click on the Tractor, Trailer and/or Driver Tabs
3. Click **Remove** to remove the resource from each tab as required
4. Click **Close**

Allocating Preferred Resource to a Load

Preferred resources can be allocated to a load. This allows the load to be pre-allocated Tractor, Trailer, Driver or any combination. Once allocated, the resources will appear in the preferred resources fields. This will not affect the planning status of the load (the status of the load will stay at PL instead of RS). The resources can then be changed as many times as necessary prior to the load being classed as Resourced. Once the Resources are correct the Load can be allocated to Preferred. This will move the preferred resources into the Allocated Resource fields and move the load status to RS when applicable.

Resource a load with Preferred Resources

1. Right Click on the Load (Traffic Sheet)
2. Select Resources
3. Click Select Preferred

Note: Preferred resources can also be allocated from the Order Pool from the right click menu

Move Preferred Resources to Allocated

Once preferred resources have been selected the Job can be allocated to the resources, if a preferred tractor has been selected then once allocated the Job will be planned on the Gantt against the relevant vehicle

From the Traffic Sheet:

1. Right Click on the Load
2. Select Resources
3. Select **Move Preferred to Allocated**

The Resources will be visible in the Allocated Resource columns; if tractor resource has been applied the leg will also be visible on the Gantt:

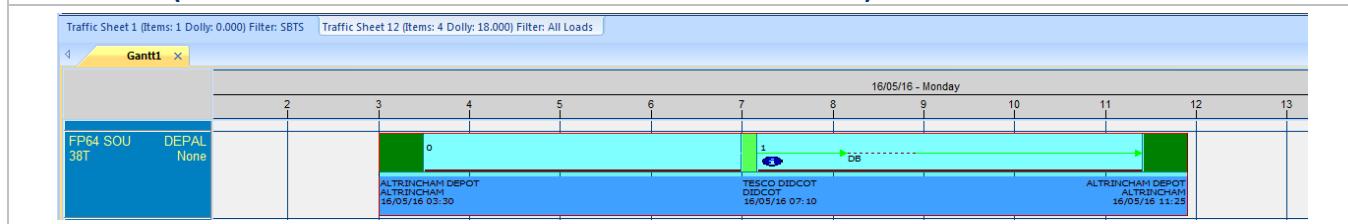
Traffic Sheet

Traffic Sheet 12 (Items: 4 Dolly: 18.000) Filter: All Loads																	
S.	Load Status	A	Depot	Load Name	Route	Start Load	Finish Load	Load Dur...	Total Empty Run...	Total Empty Run...	Tractor	Trailer	Pref Tractor	Pref Trailer	Pref Driver	Trip C...	Trip
▶	PL	AL	C TESCO DIDCOT 03:30>D ALTRINCHAM DEPOT 07:10	16/05/16 03:30	16/05/16 07:10	3:40		0 kms	0:00				FP64 SOU	FA09	DR01		
▶	PL	AL	SB101		17/05/16 00:00		0:00		0:00								
▶	PL	AL		16/05/16 00:00			0:00		0:00								
RS	RS	AL	SB101	C ALTRINCHAM DEPOT 09:02>D/C TESCO DONCASTER	16/05/16 09:02	16/05/16 12:44	3:42	0 kms	0:00	FP63 HMF	CU01 *						

Order Pool

Order Pool 2 (Items: 3 Dolly: 18.000)																			
Cur Stage	Depot	A	Sts	Job Number	Job Type	Customer Code	Shipper	Collection Description	Delivery Descript...	FD Address Descript...	Pallet	Dolly	Load Na...	Tractor	Driver	Pref Tractor	Pref Trailer	Pref Driver	Col
▶	PL	AL	▶	AL/0000002	ST	SBCUST	EAT	TESCO DIDCOT	ALTRINCHAM D...	TESCO DONCASTER	4:000	4:000			FP64 SOU	FA09	DR01	16/1	
RS	RS	AL	▶	AL/0000003	ST	SBCUST	EAT	TESCO DONCASTER	ALTRINCHAM D...	ALTRINCHAM DEP...	10:000	10:000	SB101	FP63 HMF	KS01			16/1	
RS	RS	AL	▶	AL/0000002	ST	SBCUST	EAT	ALTRINCHAM DEPOT	TESCO DONCASTER	TESCO DONCASTER	4:000	4:000	SB101	FP63 HMF	KS01			16/1	

Gantt Chart (Once the Preferred vehicle has been moved to allocated)



Load Despatch

Once a load has been resourced and is ready to be despatched the despatch status and date and time can be recorded in ESP using the Despatch function.

Note: Before a load can be despatched, all major and minor alerts need to be resolved

Despatching a Load from the Traffic Sheet or Supplier Bin

1. Locate the Load
2. Right Click on the load Click **Despatch Load**

The despatch Load window is displayed:

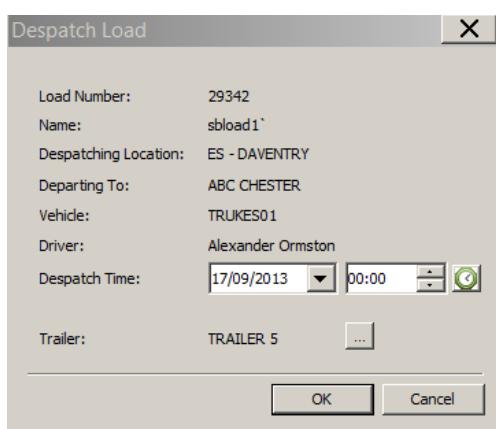


Figure 50

3. Despatch Time, Select or key in the despatch date and time

Note: System Defaults determine if the Despatch time defaults to the current time or planned time. The button to the right of the despatch time  will reset the time to either depending upon how the default is set. For example if the default is set to current time then clicking on the button will default the time to the planned time or vice versa.

1. **Trailer**, check the trailer details and Click  to change the trailer if required.
2. Click **OK**

The Load status will change to DS and the Despatch date and time will be visible in the Traffic Sheet:

Traffic Sheet 2 (Items: 2 Dolly: 82.000)										
S.	A.	Load ID	Load Status	Load N...	Despatch Time	Tractor	Trailer	Driver	Route	Ordered Quantity
										N.
		238408	DS		12/05/16 01:00	GH65 ...	T107	DRIV 05	S Faversham Depot 01:00>MT 413>C ABC CHESTE...	76.000

Figure 51

Note: Loads can also be despatched from the Load Manager by clicking on the Despatch Button.

Un-Despatching a Load from the Traffic Sheet or Supplier Bin

Despatched loads can be 'Un-Despatched' by using the Undespatch function (access must be granted to the user in ESP Admin). The Undespatch function changes the load status from DS (Despatched) to RS (Resourced)

1. Select the Load
 2. Right Click on the Load and Click **Un-despatch Load**
 3. Click **Yes** to Confirm
- Alternatively
4. Open the Load Manager, Click the **Un-Despatch** button
 5. Click **Yes** to Confirm

Loads can be un-despatched from the Traffic Sheet, Gantt Chart or Load Manager:

Despatched Load							Un-despatched Load										
Traffic Sheet 2 (Items: 2 Dolly: 82.000)							Traffic Sheet 2 (Items: 2 Dolly: 82.000)										
S.	A.	Load Id	Load Status	Load N...	Despatch Time	Tractor	Trailer	Driver	S.	A.	Load Id	Load Status	Load N...	Despatch Time	Tractor	Trailer	Driver
		238408	DS		12/05/16 01:00	GH65...	T107	DRIV 05			238408	RS			GH65...	T107	DRIV 05

Reports

Reports can be accessed from the Traffic Sheet, Load Manager, Gantt Chart or Order Pool (depending upon configuration) using the Reports Option. Reports are generally customised to meet operational requirements and are generally accessed from the right click menu. The example below is for illustration purposes only and displays a Standard Load Summary Report.

1. Locate the Load in either the Traffic Sheet or Gantt Chart
2. **Right Click** on the load
3. Click **Reports, Print or Print Preview, Drivers Load Summary, Standard**
4. Select the number of copies from the Print window
5. Click **OK**

The drivers Paperwork will either be printed or previewed on the screen:

Driver's Load Summary										ALTRINCHAM DEPOT Printed: 17/09/2013 10:31			
Depot:	SB	Dispatch Date :	17/09/2013	Departure Time :	0:00								
Tel No:													
Fax No:	Groupage Job No: ES0000223												
Driver:	Start Time:	<input type="text"/>	Closing Odo:	<input type="text"/>	Fuel 1:	<input type="text"/> ltrs	Fill Point 1:	<input type="text"/>					
Vehicle Reg:	Finsh Time:	<input type="text"/>	Opening Odo:	<input type="text"/>	Fuel 2:	<input type="text"/> ltrs	Fill Point 2:	<input type="text"/>					
Trailer Out:	Hours Worked :	<input type="text"/>	Total Kms:	<input type="text"/>	POA:	<input type="text"/>	Breaks:	<input type="text"/>					
Trailer In:													
Client Reference	Client Code	Collection Point	Delivery Point	Cases	Weight	Pallet	Act Plts	GTS Number	Post Code				
SBCUST	ABC CHESTER CHESTER	ABC ALLTRINCHAM ALTRINCHAM		10.00	10	10.00	<input type="text"/>	SB/0000001	WA14 5EN				
Collection Instructions			Delivery Instructions	Delivery: 0:00 Sched Arr: 4:22 Actual Arr: <input type="text"/> Customer Signature: <input type="text"/>				Due by: 0:00 Sched Dep: 5:22 Actual Dep: <input type="text"/>					
Total Items: 10.00		Est Pallets:	10.00	Act Pallets:	<input type="text"/>	Total Weight (KG): 10							
Received By : (Print Name) <input type="text"/> (Signature) <input type="text"/>				Loaded By : (Print Name) <input type="text"/> (Signature) <input type="text"/>									
Supervisor Confirmation : (Print Name) <input type="text"/> (Signature) <input type="text"/>													

Figure 52

Completing Loads

Confirming a Load as Completed

Loads can either be debriefed in ESP or confirmed as being completed. If debrief information\actual times aren't required or available for a load; the load can still be completed to allow the job to be invoiced in GTS.

Note: *Loads must be despatched before they can be confirmed as being completed.*

Completing a Load from the Traffic Sheet/Supplier Bin

1. Right Click on the Load
2. Click Complete
3. If the load has not had driver debrief information recorded the following message will appear

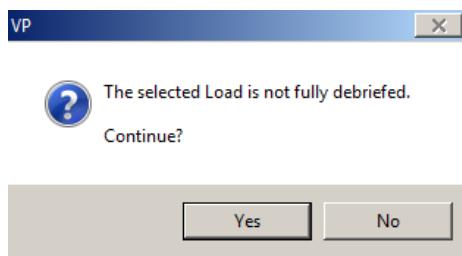


Figure 53

4. If the load has had driver debrief information recorded the following message will appear

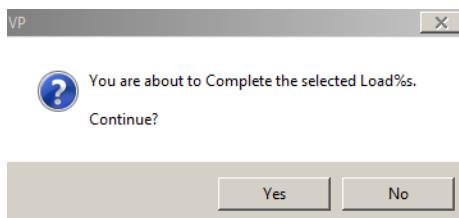


Figure 54

5. Click Yes to complete the load

Note: Loads can also be completed from the Load Manager by clicking on the Complete Button.

The Load status will change to CO and the Load will be marked as completed on the Gantt chart:



Un-Completing Loads in ESP

Users with the relevant authority level can un-complete loads this may be necessary to adjust details for the load prior to invoicing. Loads can only be uncompleted in ESP if the user has the relevant permission, also if the load has been authorised for invoicing it will need to be unauthorised before the load can be uncompleted.

ESP

Users who have access to Uncomplete in ESP will have access to the Uncomplete button in the Load Manager (user authority controls access to this function)

Note: If Jobs are set to AU status in GTS they will need Un-authorising for Invoicing in GTS before this button will be available.

1. Access Load Manager
2. Click the **Uncomplete** button

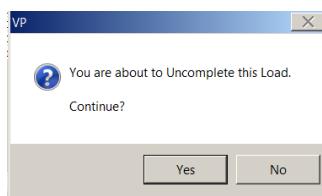


Figure 55

3. Click **Yes**

Completed Load Restrictions

Restrictions to Loads

Loads are completed using Debrief or the Complete loads function in ESP. Restrictions apply to completed loads. When the load is Authorised for Invoicing or Rate Confirmation (Supplier Payment) further restrictions apply. Further restrictions then apply once the load has been Rate Confirmed or contains a job that has been invoiced.

CO AU & IN Jobs on Loads

Completed Loads
CO - Jobs at CO stage can be removed providing one job matching the stops in the route is left on the load. This will not be possible if an AU or IN final delivery leg is on the load Jobs at CO stage can be removed providing there is no tick in the Invoiced Column (Not available if an AU or In Final Delivery Leg is in the load) If a Job is removed from a load its route must be retained so the stops for the leg cannot be altered.
Invoiced/Authorised for Invoicing jobs on Loads
AU - Amber ticks in the invoiced column, Job Cannot be removed, Job Can be Unauthorised in GTS to allow removal IN – Green Ticks in the invoiced column, Job cannot be removed and Job cannot be unauthorised (When the job is invoiced each load is locked at Stop level to hold the integrity of Haulage plan for the invoiced job) New Matching Stops Can be Added (locations in the leg match the stops in the load) New Stops cannot be added
Supplier Rating (Supplier Payment)
Supplier Rates : AU and RC indicators in the Rate confirmed column Loads are locked at Haulage Level. AU – Amber tick - Job is connected to a load that has been Rate Confirmed (Rate Confirmed Column) RC – Green Tick – When the Haulage plan has been Paid (Authorised or Rate Confirmed) Green tick on load indicates that new stops cannot be added or removed The load is locked Amber Tick on load indicates that stops can be removed
Earlier legs (Amber Ticks in the Rate Confirmed column) At CO Stage : Remove is available If a job is removed it will be retained in current leg stop level unless it's the final delivery leg (this can be manipulated) New Stops cannot be added Add to the end is not available Matching Location Codes can be added if the activity matches

Debriefing Loads, Recording Actual Times & POD

The options within ESP for Debrief and recording Actual times are:

- Record Driver Debrief
- Record Actual Times as part of Debrief
- Record Actual Times independently of Debrief
- Record POD as part of Debrief

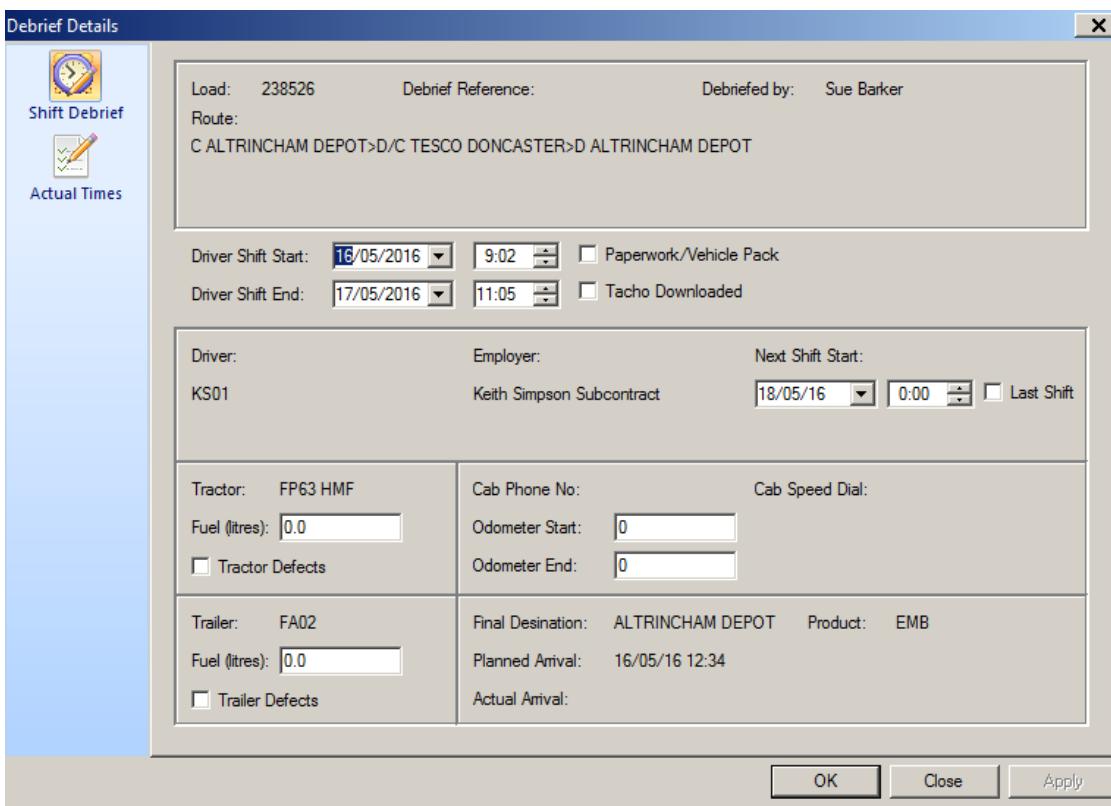
Actual times can be recorded manually or populated automatically if a vehicle tracking interface produces actual times and sends them to ESP

Driver Debrief information can be recorded for loads using the debrief function from either the Load Manager Gantt Chart, Traffic Sheet or Supplier Bin. Debrief can be configured to incorporate the following: Driver Debrief data, Actual times for Arrival/Departure and POD Details (*Actual Times have to be recorded before the POD Details function becomes visible and available*) There is a further system setting that allows times received by a tracking interface to be Overridden this is in ESP Admin, Depot Defaults.

Debrief a Load

1. From the Traffic Sheet, Supplier Bin or Gantt Chart:
2. Right Click on the load and select **Debrief Load**
3. Alternatively, from the Load Manager, Click the debrief button

The Debrief Details window is displayed:



The screenshot shows the 'Debrief Details' window with the following data:

Driver Shift Details		Employer Details		Next Shift Details	
Driver:	KS01	Employer:	Keith Simpson Subcontract	Next Shift Start:	18/05/16 0:00
Tractor:	FP63 HMF	Cab Phone No:		Cab Speed Dial:	
Fuel (litres):	0.0	Odometer Start:	0		
<input type="checkbox"/> Tractor Defects		Odometer End:	0		
Trailer Details		Final Destination:	ALTRINCHAM DEPOT	Product:	EMB
Fuel (litres): 0.0		Planned Arrival:	16/05/16 12:34		
<input type="checkbox"/> Trailer Defects		Actual Arrival:			

Buttons at the bottom: OK, Close, Apply

Figure 56

Debrief has three options (dependent upon system configuration) Shift Debrief, Actual Times and POD. Shift Debrief allows information relating to the drivers shift to be recorded. Actual times allow haulage details (actual arrival and departures) to be recorded, whilst POD allows Confirmation of actual Quantities.

Shift Debrief

1. Driver Shift Start, Key in the Drivers Shift Start Date and Time
2. Driver Shift End, Key in the Drivers Shift End Date and Time
3. Driver Next Shift Start, Enter when the driver is next available for work
4. Paperwork/Vehicle Pack, Select to confirm (Mandatory field)
5. Tacho Downloaded, Select to indicate Tacho has been downloaded
6. Tractor Fuel, Key in the Number of Litres of Fuel
7. Tractor Defects, Select to record a defect report
8. Trailer Fuel, Key in the Number of Litres of Fuel
9. Trailer Defects, Select to record a defect report
10. Odometer Start, Key in the Start Reading

Note: This will default in the latest reading for the vehicle prior to this loads shift start date/time. This can be overtyped if required

11. Odometer End, Key in the End Reading

12. Click OK to Save the Details and leave the Debrief screen or Click  to begin recording Haulage arrival and departure times.

Actual Times as part of Debrief

Actual times can be recorded manually from the Actual Times option in the debrief window. Once actual times have been recorded the POD button will be visible (POD function will only be visible if the Configuration is switched on in ESP)

When Vehicle tracking is being used the actual arrival and departure time at each location can be interfaced to GTS/ESP (dependent upon tracking system and compatible configuration). When this occurs, actual times will be populated automatically. The times recorded can be viewed from the Actual Times window and changed if the override received times setting is switched on in ESP Admin.

From the Debrief Window:

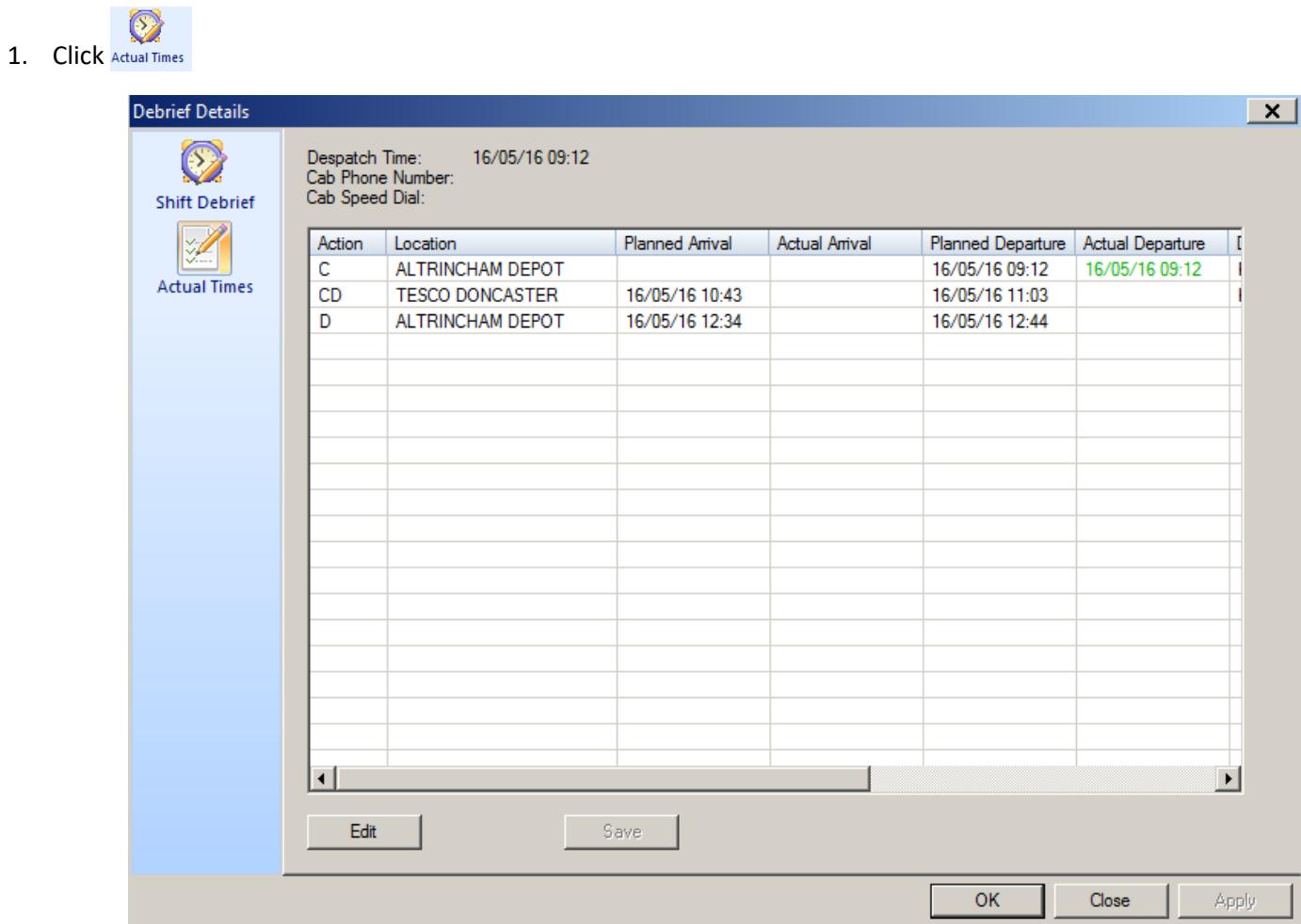


Figure 57

2. Details of the Actions, C (Collect) D (Deliver) Locations, Actual Arrival/Departure and Planned Arrival/Departure are displayed. Actual Departure time will be displayed in Green and will default in the Despatch time (this can be changed if required by clicking edit – see next step)

Record Actual Times:

1. Click on the first row
2. Click **Edit**

Location: ALTRINCHAM DEPOT

Arrival		Departure	
Planned	16/05/16 09:02	Planned	16/05/16 09:12
Actual	16/05/16 09:02	Actual	16/05/16 09:12
Loading Times			
On Bay	16/05/2016	:	
Off Bay	16/05/2016	:	
Resources Out			
Driver	KS01	<input type="button" value="Copy Previous"/>	
Trailers	CU01		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

Figure 58

3. **Actual Date and Time**, Change the Date and Time to reflect the Actuals on the Route
4. **Loading/Unloading Times**, Key in the unloading times for On Bay/Off Bay
5. **Resources Out**, Change the driver/trailer if appropriate

Note: The Copy Previous button is used to copy Resource details from the previous row.

6. **Trailer**, Change the Trailer if appropriate
7. Click **OK**

Debrief Details

 	Despatch Time: 16/05/16 09:12 Cab Phone Number: Cab Speed Dial:					
	Action	Location	Planned Arrival	Actual Arrival	Planned Departure	Actual Departure
C	ALTRINCHAM DEPOT			16/05/16 09:12	16/05/16 09:12	
CD	TESCO DONCASTER	16/05/16 10:43	16/05/16 10:43	16/05/16 11:03	16/05/16 11:03	
D	ALTRINCHAM DEPOT	16/05/16 12:34		16/05/16 12:44		
<input type="button" value="Edit"/> <input type="button" value="Save"/>						
<input type="button" value="OK"/> <input type="button" value="Close"/> <input type="button" value="Apply"/>						

Figure 59

Next, Either Repeat the steps above to record actual times for each row or alternatively use the copy function to copy the time variance recorded on row one to all other rows on the debrief screen (this is ESP configuration and will only be available if switched on in ESP config settings)

Record Details for each Row

1. Repeat the steps above to record the Actual Time Details for each Row
 2. Click **OK** to Save the Changes.

Use the Actual Times Copy function

1. Click on the first Row and Click **Copy** (copies the time variance recorded on the first Row to all other rows on the debrief screen) If this function is used the following message will be displayed

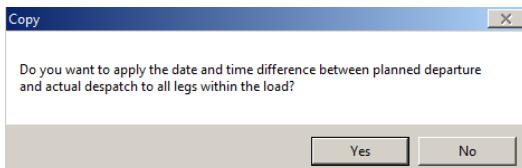


Figure 60

- ## 2. Click Yes to Copy the Variance

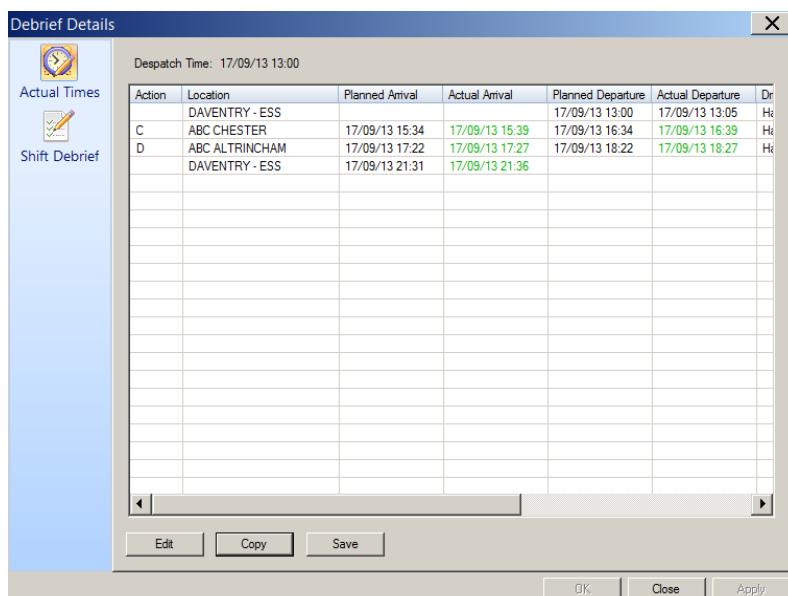


Figure 61

3. Click **Save** (Save the Details – Note this option is only available when using the copy function)
 4. Click **Close**

Visibility of Recorded Actual Times in ESP

Once actual times have been recorded they are displayed in the following places in ESP:

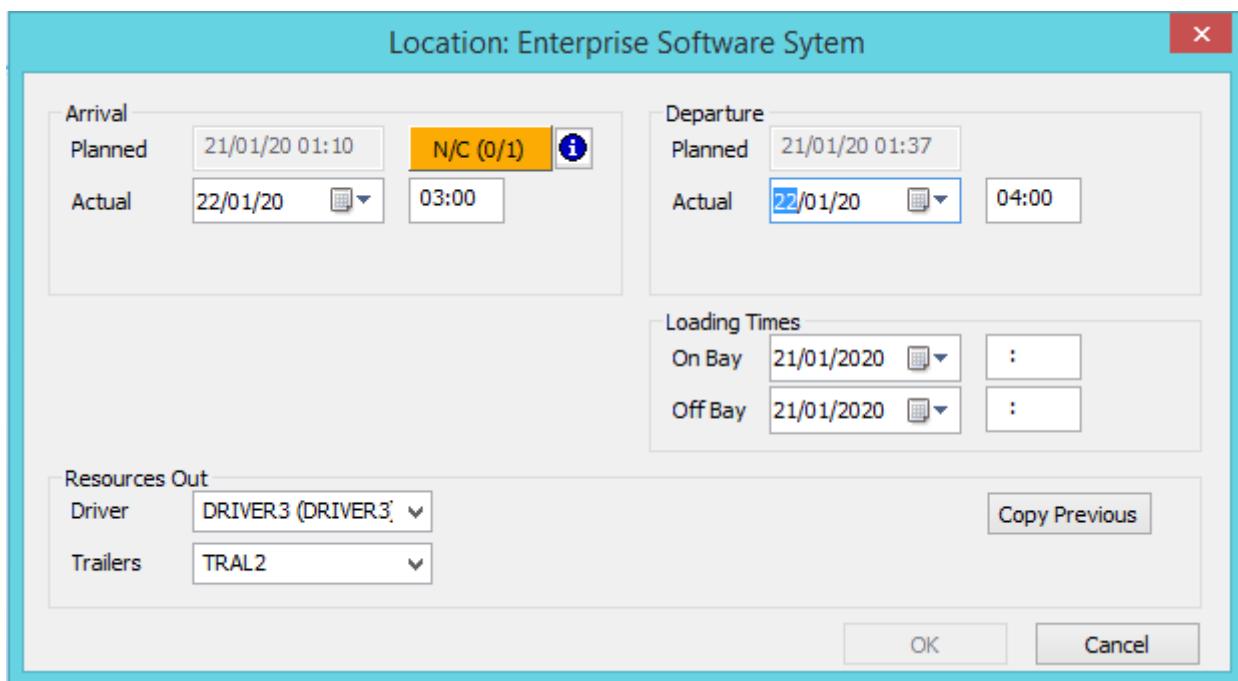
- Access the Debrief Function and Click the Actual Times button to see the times recorded
 - View the Times on the Tooltip displayed on the Gantt for each Collection and Delivery
 - Display the collection/delivery actual arrival and departure columns in the Load manager or Order Pool

Non Conformance and Actual Times

Recording Actual times can trigger a Non Conformance providing the Non Conformance flag is set on the customer master file when the order is created. If the tolerances set on the depot, customer or location master file are exceeded the Non Conformance flag will appear in orange on the Actual Times screen.

Non Conformance indicators on the Actual Times Screen

1. From the Debrief Actual times window, Click on the first row
2. Click **Edit**
3. **Actual Date and Time**, change the Date and Time to reflect the actual arrival and departure for the stop, if the tolerances set on the master file are exceeded, the N/C Non Conformance button is displayed in orange.



The screenshot shows a software dialog box titled "Location: Enterprise Software System". The dialog is for managing actual arrival and departure times. It has sections for Arrival and Departure, and a separate section for Loading Times. The Arrival section shows a Planned time of 21/01/20 01:10 and an Actual time of 22/01/20 03:00. The Departure section shows a Planned time of 21/01/20 01:37 and an Actual time of 22/01/20 04:00. The Loading Times section shows On Bay and Off Bay times both set to 21/01/2020. Below these are sections for Resources Out, showing Driver (DRIVER3 (DRIVER3)) and Trailers (TRAL2), and a "Copy Previous" button. At the bottom are OK and Cancel buttons.

Figure 62

The  (information) button can be clicked to see details of the non conformance on the information screen.

Non Conformance Information Screen

Non-Conformance Info - Arrival

AL/0000338	X
Job Number:	AL/0000338
Load Id	19765
Stop Number:	2
Planned Time:	21/01/20 01:37
Collection Non-Conformance Type:	L
Delivery Non-Conformance Type:	L
Customer:	SB Customer
Check for Non-Conformance:	Yes
Location:	Enterprise Software System
Collection Tolerance:	300
Delivery Tolerance:	300
Customer:	SB Customer
Collection Tolerance:	5
Delivery Tolerance:	5
Depot:	AL ALTRINCHAM DEPOT
Collection Tolerance:	10
Delivery Tolerance:	10
Window Type:	Collection
From:	21/01/20 01:00
To:	21/01/20 02:00
Actual Time:	22/01/20 03:00
Final From:	20/01/20 20:00
Final To:	21/01/20 07:27
Non-Conforms:	Yes
Blue means being considered for Non-Conformance	
Close	

The information screen displays all the settings in GTS that can trigger a non conformance for the job.

The tolerance that has triggered the Non Conformance in the example above is from the location master file, this is indicated as blue text on the screen. The Type section displays the type of non conformance (L - Late) and the actual time is displayed in orange to indicate the Order Non Conforms.

Recording the Non Conformance

The Non Conformance must be recorded before the times entered on the actual times screen can be saved (notice in the screenshot below the OK button is inactive)

Location: Enterprise Software System

Arrival	Planned	21/01/20 01:10	N/C (0/1) 	
Actual	22/01/20	<input data-bbox="404 550 452 595" type="button" value="..."/>	03:00	
Departure	Planned	21/01/20 01:37		
Actual	22/01/20	<input data-bbox="976 550 1024 595" type="button" value="..."/>	04:00	
Loading Times				
	On Bay	21/01/2020	<input data-bbox="976 685 1024 729" type="button" value="..."/>	:
	Off Bay	21/01/2020	<input data-bbox="976 729 1024 774" type="button" value="..."/>	:
Resources Out				
Driver	DRIVER3 (DRIVER3, v)			<input data-bbox="992 842 1135 887" type="button" value="Copy Previous"/>
Trailers	TRAL2			
<input data-bbox="928 954 976 999" type="button" value="OK"/> <input data-bbox="1087 954 1151 999" type="button" value="Cancel"/>				

1. To record the Non Conformance, Click the orange N/C button
2. The Customer Service Non Conformance Issue window is displayed next:

Raise Customer Service Issue 1 of 1

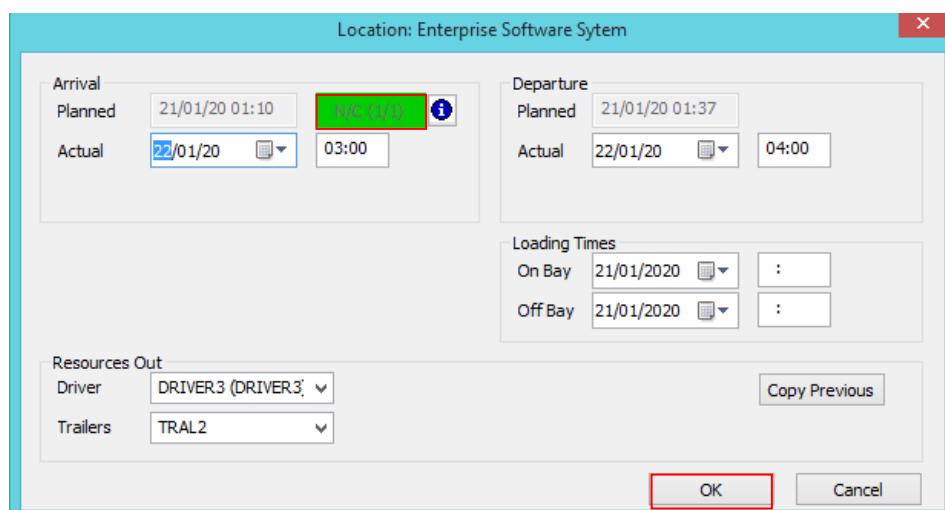
Job Number: AL/0000338	Reported Late <input data-bbox="786 1291 865 1336" type="button" value="No"/>
Customer Service Number: 428	
Corrective Action	
Owner <input data-bbox="246 1358 468 1403" type="text" value="BARKERS"/> ...	<input checked="" type="checkbox"/> In Progress
Resolve by <input data-bbox="786 1358 865 1403" type="button" value="21/01/20"/>	<input data-bbox="786 1403 865 1448" type="button" value="14:15"/>
<input checked="" type="radio"/> Urgent	<input type="radio"/> ASAP
<input type="radio"/> Non Urgent	
<input type="checkbox"/> Customer Advised	
Claim Details	
<input type="checkbox"/> Potential Claim	<input type="checkbox"/> Claim Against Supplier
Supplier <input data-bbox="246 1605 579 1650" type="button" value="Supplier"/>	Amount <input data-bbox="786 1605 865 1650" type="button" value="0"/>
Non-Conformance Type: L - LATE	
Reason	
<input type="checkbox"/> PD - LATE PREVIOUS DROP <input checked="" type="checkbox"/> TR - LATE TRAFFIC <input type="checkbox"/> UI - LATE UNDERINVESTIGATION	
Details	
Requested Del Date/Time - 210120 0600 Actual Del Date/Time - 220120 0300	
<input data-bbox="786 1852 865 1897" type="button" value="Reset"/>	
Product Text <input data-bbox="246 1897 420 1942" type="text" value="ENTER TEXT..."/>	Unit <input data-bbox="436 1897 611 1942" type="button" value="Select..."/>
Quantity <input data-bbox="786 1897 865 1942" type="button" value="0"/>	Demurrage Amount <input data-bbox="786 1942 865 1987" type="button" value="0"/>
<input data-bbox="150 2021 262 2066" type="button" value="Comments"/>	
<input data-bbox="659 2021 770 2066" type="button" value="OK"/> <input data-bbox="817 2021 928 2066" type="button" value="Cancel"/>	

3. Complete the following Mandatory Field,

- Reason

4. Then complete any other fields as necessary, Click OK to record the Non Conformance

Once all the Non Conformances have been cleared the N/C button will be displayed in green and the OK button will be available.



POD

The POD button provides access to record and view POD information.

- From the Debrief window, click the POD button

Debrief Details

Action	Location	Planned Arrival	Actual Arrival	Planned Departure	Actual Departure	Driver
	ALTRINCHAM DEPOT			20/01/20 02:00	20/01/20 02:00	DRI'
C	Enterprise Software System	20/01/20 02:10		20/01/20 02:55		DRI'
C	Marks & Spencer Altricham	20/01/20 03:02		20/01/20 03:47		DRI'
D	Enterprise Software System	20/01/20 03:54		20/01/20 04:54		DRI'
D	Marks & Spencer Altricham	20/01/20 05:01		20/01/20 06:01		DRI'
	ALTRINCHAM DEPOT	20/01/20 06:08				

< >

Edit Copy Save

OK Close Apply

- The POD screen will be displayed, to see details of jobs on the load click the Show All tick box

Debrief Details

Job Number	POD ...	Collection	Delivery	Commodity	UOM	Cc
AL/0000334	N	Enterprise Softw...	Marks & Spence...	PALLET	PALLET	10
AL/0000335	N	Marks & Spence...	Enterprise Softw...	PALLET	PALLET	10

POD Details POD All Show All

OK Close Apply

1. To **POD all** the jobs on the load click the **POD all** button (this can be selected even if the show all option hasn't been ticked) This action will set the POD flag to yes for all jobs on the load and default in the collection and delivery quantities, if you wish to record a pod number or collection or delivery discrepancies then you need to select each line on the load and click POD Details.

2. To **POD** each individual job and enter POD details, Click on the job then click on the **POD Details** button

POD Details

Job Number	AL/0000334	Collection	Enterprise Software System
Delivery	Marks & Spencer Altricham		
POD <input checked="" type="radio"/> Not Confirmed <input type="radio"/> Confirmed & Clean <input type="radio"/> Confirmed But Late <input type="radio"/> Confirmed With Clause		Number <input type="text"/> Description <input type="text"/>	
Collected Quantity <input type="text"/> N/C		Delivered Quantity <input type="text"/> N/C	
Commodity	UOM	Ordered Qty	Collected Qty
PALLET	PALLET	10.00	10.00
Delivered Qty	Secondary UOM	Secondary Colle...	
10.00	NULL	0	

OK Cancel

5. **POD**, Click on the relevant option, Confirmed and Clean, Confirmed but Late or Confirmed with Clause
6. **Number and Description**, Key in the pod number in the pod field and any description in the description field
7. **Commodity**, Key in the collected and delivered qty if these differ to the ones displayed (these default in from the ordered qty)
8. Click **OK** to confirm the details, the POD received flag will be set to Yes (visible in the order pool) and also set to Yes in GTS. Any additional details such as POD number, Collected Qty and Delivered Qty will also be sent to GTS. If the POD status is set to Confirmed with Clause, ESP will display a C in the POD Status on the debrief pod screen and GTS will display a C in the POD field.

POD Flag Set to Yes – ESP Order Pool				POD Flag Set to Yes – GTS POD Screen							
Order Pool 1 (Items: 18 Weight (kg): 0.042 Cube (m3): 0.003 Pallet: 42         All Orders				Job Number 01/0000298							
POD Received	P	S.	Planning Depot	Number	A	Job Number	Customer Ref	POD	Col. Date	In Time	Col. Date
Y			AL	AL/0000334	01/0000298			Y	200120	400	200120
N			AL	AL/0000335					500		2.000

Non Conformance and POD

Recording POD details can trigger a Non Conformance providing the Non Conformance flag is set on the customer master file when the order is created. If the tolerances set on the customer master file are exceeded the Non Conformance flag will appear in orange on the POD details screen.

Non Conformance indicators on the POD Details Screen

POD Details

Job Number	AL/0000335	Collection	Marks & Spencer Altricham
		Delivery	Enterprise Software System
POD <input checked="" type="radio"/> Not Confirmed <input type="radio"/> Confirmed & Clean <input type="radio"/> Confirmed But Late <input type="radio"/> Confirmed With Clause		Number	<input type="text"/>
		Description	<input type="text"/>
Collected Quantity <input type="button" value="N/C (0/1)"/> 		Delivered Quantity <input type="button" value="N/C (0/1)"/> 	
Commodity	UOM	Ordered Qty	Collected Qty Delivered Qty
PALLET	PALLET	10.00	8.00 6.00
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

When Non conformance for the job is required, the N/C buttons are displayed in orange. These are shown for both the collected and delivered quantities in the example above as these differ to the order, and exceed the tolerance set on the customer master file. The  (information) button can be clicked to see details of the non conformance on the information screen.

Non Conformance Information Screen

Non-Conformance Quantity Info - Collected

LineNo:	2
Job Number:	AL/0000335
Load Id	19762
Stop Number:	3
Time:	
Line No:	2
Collection Non-Conformance Type:	SCO
Delivery Non-Conformance Type:	SDC
Customer:	SB Customer
Check for Non-Conformance:	Yes
Commodity Product:	PALLET pallet
Collection Quantity Tolerance:	0.000000
Delivery Quantity Tolerance:	0.000000
Collection Quantity Tolerance Flag:	Actual
Delivery Quantity Tolerance Flag:	Actual
Customer:	SB Customer
Collection Quantity Tolerance:	0.010000
Delivery Quantity Tolerance:	0.010000
Collection Quantity Tolerance Flag:	Actual
Delivery Quantity Tolerance Flag:	Actual
Depot:	AL ALTRINCHAM DEPOT
Collection Quantity Tolerance:	0.100000
Delivery Quantity Tolerance:	0.100000
Collection Quantity Tolerance Flag:	Actual
Delivery Quantity Tolerance Flag:	Actual
Type:	Collection
Quantity Start:	10.000000
Quantity End:	10.000000
Actual Quantity:	8.000000
Final Quantity Start:	9.990000
Final Quantity End:	10.010000
Non-Conforms:	Yes
Blue means being considered for Non-Conformance	
<input type="button" value="Close"/>	

The information screen displays all the settings in GTS that can trigger a non conformance for the job.

The threshold that has triggered the Non Conformance is from the customer master file, this is indicated as blue text on the screen. The Type section displays the type of non conformance (Collection) and the actual quantity is displayed in orange to indicate the Order Non Conforms.

Recording the Non Conformance

The Non Conformance must be recorded before the quantities entered on the pod details screen can be saved (notice in the screenshot below the OK button is inactive)

POD Details

Job Number	AL/0000335	Collection	Marks & Spencer Altricham
		Delivery	Enterprise Software System
POD <input checked="" type="radio"/> Not Confirmed <input type="radio"/> Confirmed & Clean <input type="radio"/> Confirmed But Late <input type="radio"/> Confirmed With Clause		Number	<input type="text"/>
		Description	<input type="text"/>
Collected Quantity <input type="button" value="N/C (0/1)"/> ?		Delivered Quantity <input type="button" value="N/C (0/1)"/> ?	
Commodity	UOM	Ordered Qty	Collected Qty
PALLET	PALLET	10.00	8.00
Delivered Qty	Secondary UOM	Secondary Colle...	
6.00	NULL	0	

- To record the Non Conformance, Click the orange N/C button

The Customer Service Non Conformance issue window is displayed next:

Raise Customer Service Issue1 of 1

Job Number: AL/0000335

Customer Service Number: 424	Reported Late <input type="button" value="No"/>
Corrective Action	
Owner <input type="text" value="SB"/> <input type="button" value="..."/>	<input checked="" type="checkbox"/> In Progress
<input checked="" type="radio"/> Urgent	<input type="radio"/> ASAP
<input type="radio"/> Non Urgent	<input type="button" value="17:20"/>
<input type="checkbox"/> Customer Advised	
Claim Details	
<input type="checkbox"/> Potential Claim	<input type="checkbox"/> Claim Against Supplier
Supplier <input type="text"/> <input type="button" value="▼"/>	Amount <input type="text" value="0"/>
Non-Conformance Type: <input type="button" value="SCO - STOCK COLLECTION DIFF ORDERED"/>	
Reason	
<input type="checkbox"/> CE - CUSTOMER ERROR	
Details	
Ordered Quantity - 10.000	
Collected Quantity - 8.000	
<input type="button" value="Reset"/>	
Product Text <input type="text" value="ENTER TEXT..."/>	Unit <input type="button" value="Select..."/>
Quantity <input type="text" value="0"/>	Demurrage Amount <input type="text" value="0"/>
Comments <input type="text"/>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

10. Complete the following Mandatory Field,

- Reason

11. Then complete any other fields as necessary, Click OK to record the Non Conformance

Once all the Non Conformances have been cleared the N/C button will be displayed in green and the OK button will be available

POD Details

Job Number	AL/0000335	Collection	Marks & Spencer Altricham		
Delivery	Enterprise Software System				
POD					
<input checked="" type="radio"/> Not Confirmed <input type="radio"/> Confirmed & Clean <input type="radio"/> Confirmed But Late <input type="radio"/> Confirmed With Clause		Number			
		Description			
Collected Quantity			Delivered Quantity		
N/C (1/1) 			N/C (1/1) 		
◀ ▶					
OK Cancel					

Commodity	UOM	Ordered Qty	Collected Qty	Delivered Qty	Secondary UOM	Secondary Colle...
PALLET	PALLET	10.00	8.00	6.00	NULL	0

12. To see details of the non conformances entered click the Info button 

The Non Conformance issues button will now also be visible in the load manager, and the Non Conformance columns will display the Non Conformance symbol in the order pool, traffic sheet and supplier bin.

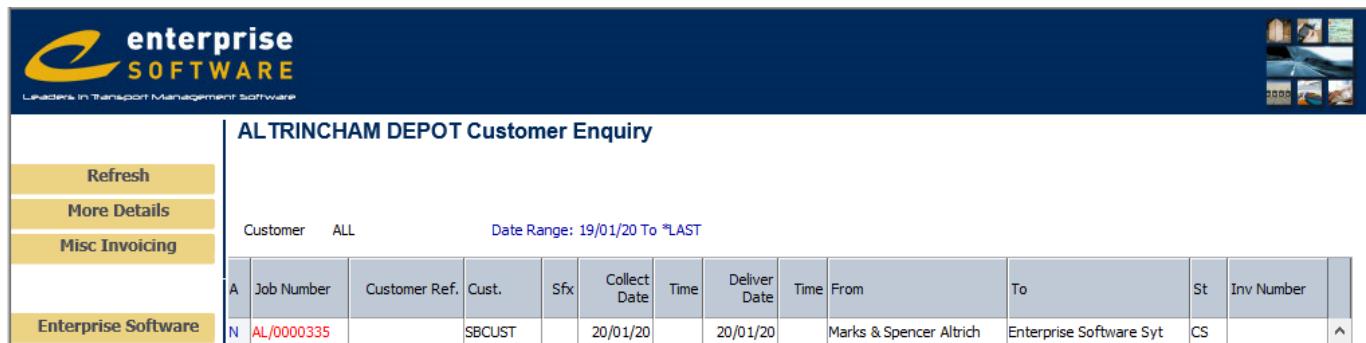
Non Conformance Indicators

Order Pool, Traffic Sheet & Supplier Bin Columns	Load Manager Issues Button
Non-Conformance  	Issues

Non Conformance in GTS

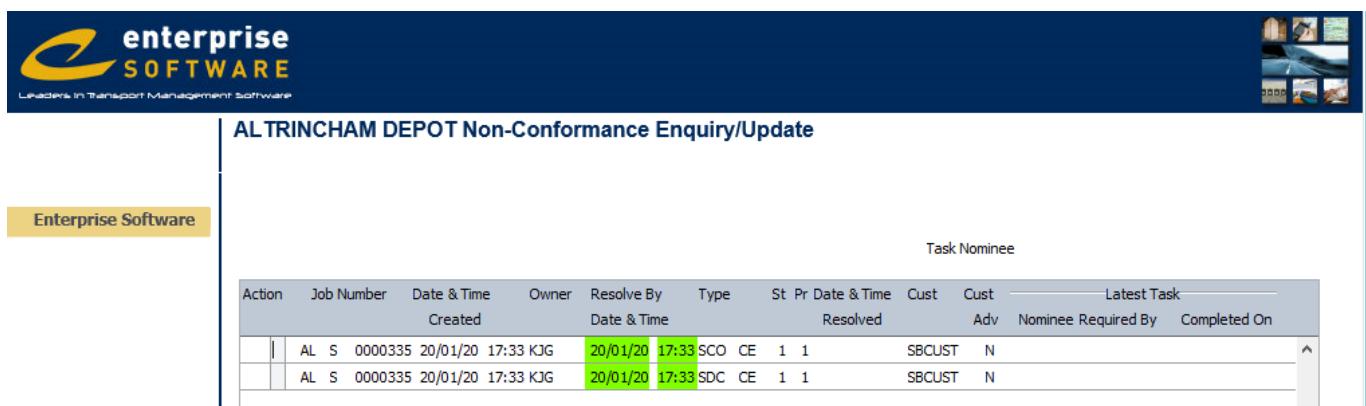
When a job has had a non-conformance recorded the job number will be displayed in Red in GTS Customer Enquiry. The Non conformance can be viewed by keying in action code N against the Job

GTS Job Number in Red in Customer Enquiry:



The screenshot shows the 'ALTRINCHAM DEPOT Customer Enquiry' interface. On the left, there's a vertical toolbar with buttons for Refresh, More Details, Misc Invoicing, and Enterprise Software. The main area displays a table with columns: A, Job Number, Customer Ref., Cust., Sfx, Collect Date, Time, Deliver Date, Time, From, To, St, and Inv Number. A row is selected with the following values: A (N), Job Number (AL/0000335), Customer Ref. (SBCUST), Cust. (SCO), Sfx (CE), Collect Date (20/01/20), Time (17:33), Deliver Date (20/01/20), Time (17:33), From (Marks & Spencer Altrich), To (Enterprise Software Syt), St (CS), and Inv Number (blank). The 'Job Number' cell is highlighted in red.

GTS Non Conformance Enquiry/Update screen (Action code N from customer enquiry)



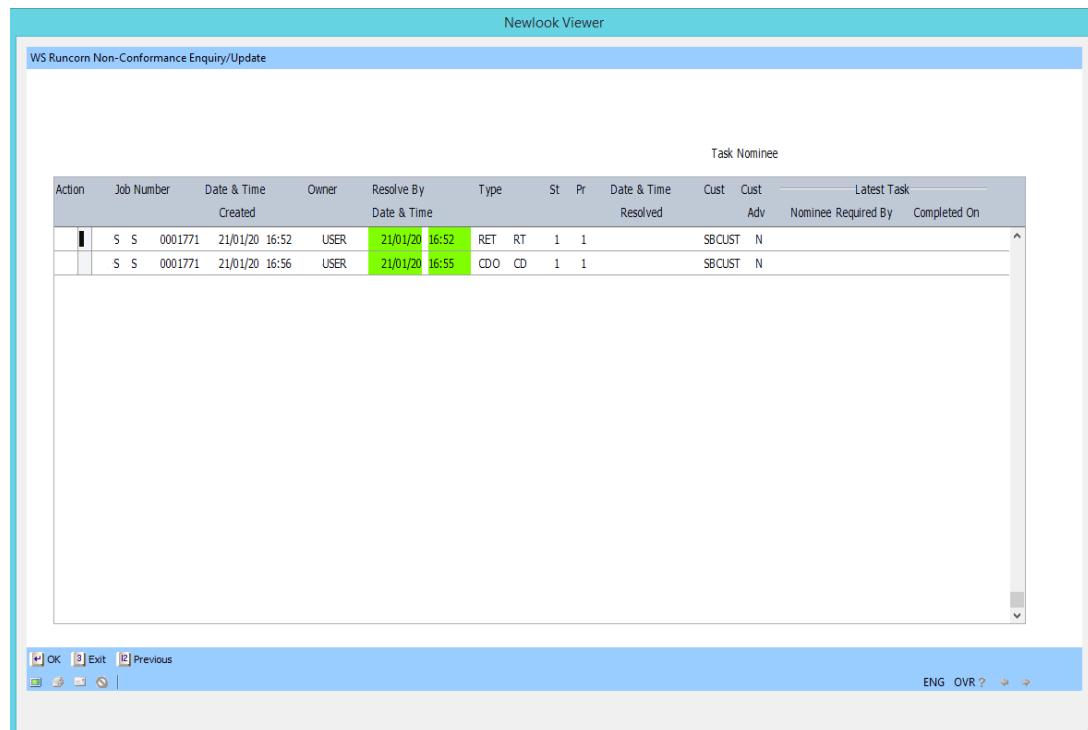
The screenshot shows the 'ALTRINCHAM DEPOT Non-Conformance Enquiry/Update' interface. On the left, there's a vertical toolbar with a single button for Enterprise Software. The main area displays a table titled 'Task Nominee' with columns: Action, Job Number, Date & Time, Owner, Resolve By, Type, St, Pr, Date & Time, Cust, Cust, Latest Task, and Task Nominee. The table contains two rows of data. The first row has the following values: Action (Created), Job Number (AL S 0000335), Date & Time (20/01/20 17:33), Owner (KJG), Resolve By (20/01/20 17:33), Type (SCO), St (1), Pr (1), Date & Time (Resolved), Cust (SBCUST), Cust (N), Latest Task (blank), and Task Nominee (blank). The second row has the same values. The 'Job Number' cell in the first row is highlighted in red.

Accessing GTS Non Conformance from ESP

When a Job has non conformance recorded against it in ESP the details are held in GTS. It is possible to view GTS Non Conformance in ESP from the Order pool.

1. From the Order Pool, Right Click on the order with the non conformance
2. Select Non Conformance from the menu
3. Key in your GTS User name and password and click OK

The GTS Non Conformance screen will be displayed



Action	Job Number	Date & Time	Owner	Resolve By	Type	St	Pr	Date & Time	Cust	Cust	Latest Task	Nominee Required By	Completed On
				Created	Date & Time			Resolved					
	S S	0001771	21/01/20 16:52	USER	21/01/20 16:52	RET	RT	1 1	SBCUST	N			
	S S	0001771	21/01/20 16:56	USER	21/01/20 16:55	CDO	CD	1 1	SBCUST	N			

Changing Debrief information

1. From the Traffic Sheet or Gantt Chart
2. Right Click on the load and Click Debrief Load
3. Change details on the Shift Debrief, Actual Times and POD screens as required

Next Location ETA (Estimated Time of Arrival)

When drivers are running late/delayed due to traffic they can phone in their estimated time of arrival. This can be updated on the ETA screen, the ETA column can also be made visible on the Traffic Sheet

Record ETA

From the Traffic Sheet or Gantt Chart

1. Right Click on the load and select Next Location ETA
2. Estimated Arrival, Record Details of the Drivers Estimated Arrival time at the next location
3. Comments, Enter any comments relating to the ETA

Non Conformance and ETA

If Non conformance is configured and enabled for recording ETA's , Non Conformance details will be available allowing a reason to be selected for the ETA.

1. Non Conformance required, tick the box and tick the relevant code for the ETA

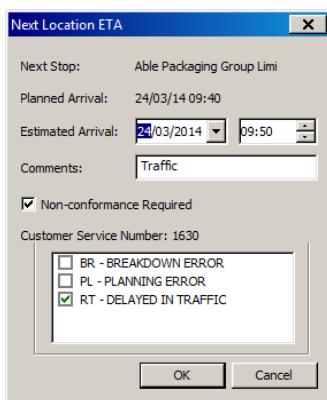


Figure 63

2. Click **OK** to Save the Changes.

Change or Display ETA

1. From the Traffic Sheet or Gantt Chart
2. Right Click on the load and select Next Location ETA
3. Change any details as required and Click OK

Visibility of ETA on the Traffic Sheet

1. From the Traffic Sheet
2. Display the Next Location ETA Column

Traffic Sheet 12 (Items: 4 Dolly: 18.000) Filter: All Loads										
	S.	Load Status	A	Depot	Load Name	Route	Start Load	Finish Load	Load Dur.	Next Location E...
	►	DS		AL	C TESCO DIDCOT 04:30>D ALTRINCHAM DEPOT 08:55		16/05/16 01:00	16/05/16 08:55	7:55	16/05/16 04:30

Figure 64

- The Next Location ETA field displays the Estimated Time of Arrival and is shaded in Yellow to indicate that the time has been manually recorded
- The Non Conformance column in the traffic sheet  indicates that a Non Conformance has been recorded for the load.

Supplier Loads

Loads are allocated to suppliers from the Traffic Sheet or Order Pool and are visible in either the Supplier Bin or Traffic Sheet.

Display the Supplier Bin

From the menu,

1. Click File, New Supplier Bin

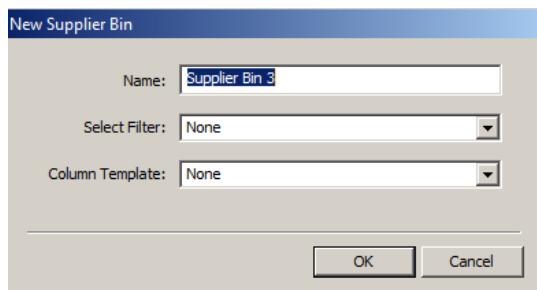


Figure 65

2. Name, Key in a name for the Supplier Bin
3. Select Filter, Select a filter (see the filtering section in this guide for more information) or leave the option set to None
4. Click OK

The Supplier bin will be displayed

Supplier Bin 5 (Items: 1 Dolly: 4.000)				
S.	Job Number	Depot	Load Name	Customer Refere...
1	GMK - GMK			
	AL/0000019	AL		

Figure 66

Allocating Jobs to a Supplier

Loads are allocated to the Supplier from the Traffic Sheet, individual Jobs at NP (Not Planned Status) can also be allocated from the order pool

From the Order Pool,

1. Locate the Job to be Allocated
2. Right Click on the Job
3. Select Allocate to Supplier

The Transfer Load to Supplier Bin window is displayed:

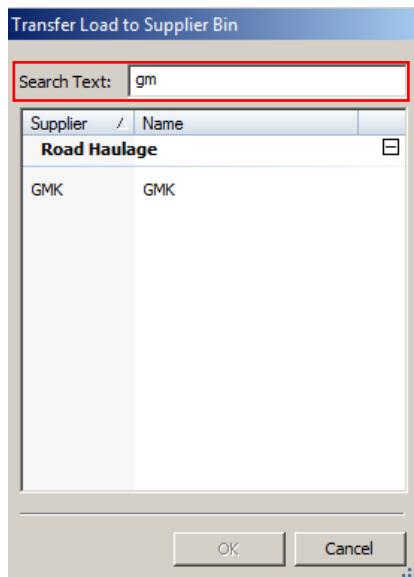


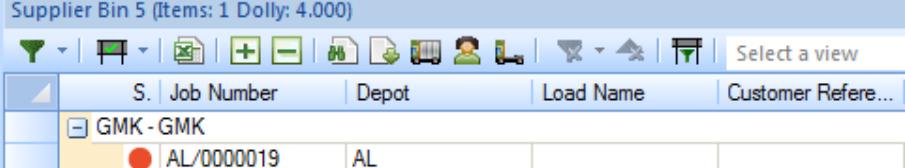
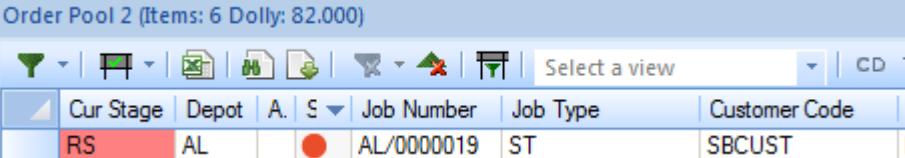
Figure 67

1. Select the relevant Supplier from the Window (Note, you can key in part of the supplier name in the search text field to search for the supplier)
2. Click **OK**

From the Traffic Sheet,

1. Locate the **Load** to be Allocated
2. Right Click on the Load
3. Select Allocate to Supplier
4. Select the relevant Supplier from the Window (Note, you can key in part of the supplier name in the search text field to search for the supplier)
5. Click **OK**

The Load will now be visible in the Supplier Bin and also visible in the Order Pool and Traffic Sheet:

Supplier Bin	Supplier Bin 5 (Items: 1 Dolly: 4.000) 
Order Pool	Order Pool 2 (Items: 6 Dolly: 82.000) 

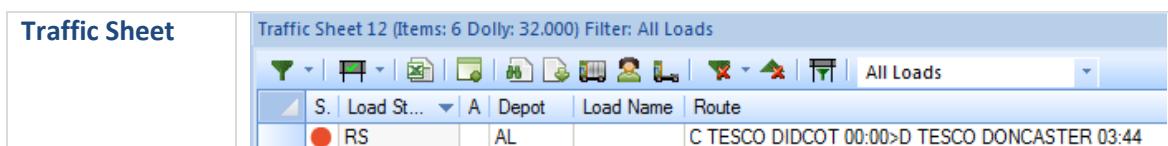


Figure 68

Removing Loads from the Supplier in the Supplier Bin:

1. Right Click on the Load in the Supplier Bin or Traffic sheet
2. Select Remove Supplier

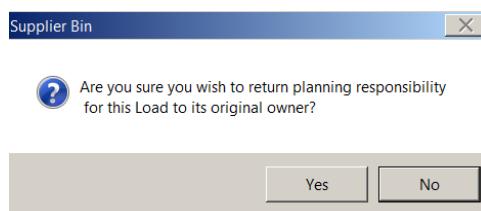


Figure 69

3. Click Yes

Removing Loads from the Supplier (Traffic Sheet)

1. Right Click on the Load in the Traffic Sheet
2. Select Remove Supplier

Or

3. Click Resources, Remove All

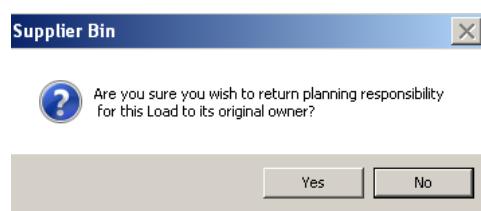


Figure 70

10. Click Yes

Opening Loads from the Supplier Bin/Traffic Sheet

1. Right Click on the Load in the Supplier Bin/Traffic Sheet

2. Click Open Load

Deleting Loads from the Supplier Bin

1. Right Click on the Load in the Supplier Bin
2. Select Delete Load

Note: Remove supplier - removes the supplier resource, leaving the load intact in the traffic Sheet, Delete Load – deletes the load returning all orders to the order pool.

Set Supplier Spot Cost (Traffic Sheet, Gantt or Supplier Bin)

Supplier Loads and costs can be visible either on the Gantt, Traffic Sheet or on the Supplier Bin.

1. Find the Load in the Supplier Bin or Traffic Sheet

Supplier Bin 5 (Items: 1 Dolly: 50.000)		
	S. Job Number	Depot
	SBSUB - SB SUBBIE	
	AL/0000020	AL

Figure 71

	If the Spot Cost Icon has a £ displayed this indicates that the job has been given a Rate from GTS.
	If the Spot Cost icon is displayed without the R this indicates that no cost has been received and the Job has been manually rated.
	If the Spot Cost icon is Red, this indicates that the load has not been rated at all, Once a Rate is either received from GTS or entered in ESP, the Icon Colour will change to Green

View, Change or Add a Spot Cost

2. Right Click on the Load in the Supplier Bin, or Traffic Sheet
3. Click

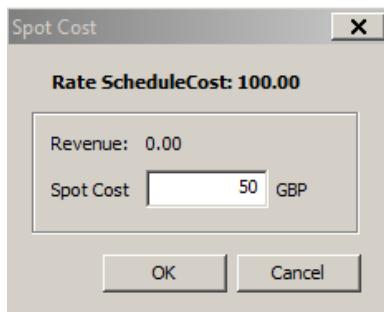
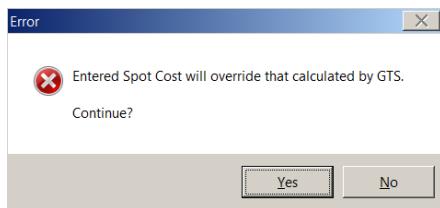


Figure 72

4. **Rate Schedule Cost**, The Rate Schedule cost will be displayed (if there is no cost visible in this field, the job has not been rated by a rate schedule)

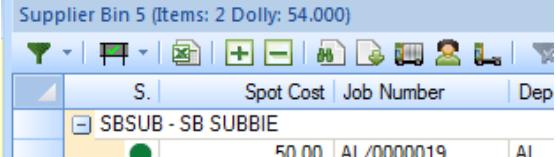
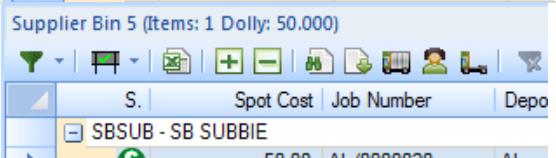
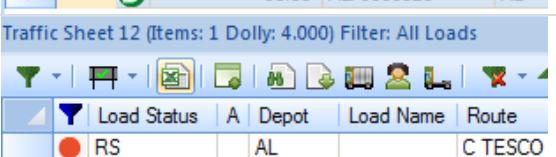
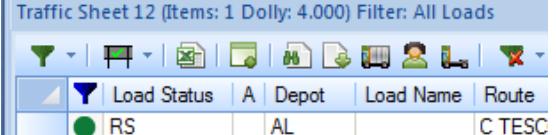
To Override the Rate Schedule cost or key in a Spot Cost

1. **Spot Cost**, Key in the Supplier Cost
2. Click **OK**



3. Click Yes

The Supplier Cost will be visible in the Supplier Bin, Order Pool and Traffic Sheet:

Supplier Bin After spot Cost	
Supplier Bin Rated with a Rate Schedule Cost	
Traffic Sheet before Spot Cost	
Traffic Sheet after Spot Cost	

The Sts Icon will either be Green, indicating that a spot cost/GTS Rate has been recorded or Red to indicate that no Spot Cost has been recorded.

Add Trailer or Driver(Traffic Sheet or Supplier Bin)

Trailers and Drivers can be added to Supplier Loads from the Traffic Sheet/Supplier Bin

To Add a Trailer:

1. Find the Load in the Supplier Bin or Traffic Sheet
2. Right Click and Click Select Trailer
3. Select the available driver from the list, Click OK

To Add a Driver:

4. Find the Load in the Supplier Bin or Traffic Sheet

-
5. Right Click and Click Select Driver
 6. Select the available driver from the list, Click OK

Add Supplier Details (Traffic Sheet)

Supplier details (Name, Telephone no, Registration) can be entered and made visible on the Traffic Sheet

From the Traffic Sheet

1. Right Click on the Load
2. Click Supplier Details
3. Key in the details in the Name, Phone Number and/or Registration fields
4. Click OK

The details will now be visible in the Traffic sheet and also in the supplier bin:

Traffic Sheet						
Traffic Sheet 12 (Items: 1 Dolly: 4.000) Filter: All Loads						
	Load Status	A	Depot	Load Name	Route	Start Load
	RS	AL		C TESCO DIDCOT 00:00>D TESCO DONCASTER 03:44		17/05/16 00:00
					Finish Load	17/05/16 03:54
					Load Dur...	3:54
					Supplier	Pierre Wells

Supplier Bin						
Supplier Bin 5 (Items: 2 Dolly: 54.000)						
	S.	Spot Cost	Job Number	Depot	Supplier Driver N...	Supplier Driver P...
	SBSUB - SB SUBBIE	50.00	AL/0000019	AL	Pierre Wells	0161 45454 AF16 KKL

Load Issues, Alerts and Overrides

ESP validates each job/leg as they are added to loads and displays details of any Issues found. Any problem found will be displayed as an alert, there may be more than one alert relating to the same issue. The Alerts functionality will ensure that any errors are dealt with prior to the load being despatched. Alerts have two levels of severity, Minor or Major. Minor Alerts can be Overridden, Major Alerts must be resolved before the load can be despatched.

Alerts

Alerts indicate that there is a planning issue with the Job. Alerts can either be Major or Minor. Certain Minor alerts can also be overridden resulting in the alert being removed from the Load.

Alert Colour Coding

If the Alert Button is Red this indicates a Major alert if the Button is Amber this indicates a Minor alert

Types of Alerts

Major Alerts (Red Alert Button) cannot be accepted. Corrective Action must be taken to clear the Alert, this can take the form of changing the job details or overriding the alert.

Minor Alerts (Orange Alert Button) can be accepted (if user has authority in Admin) and a reason code must be entered to indicate why the Alert has been accepted.

Load Overrides

Applying Overrides may result in the removal of Alerts from a Load. Only certain fields are eligible to be Overridden. See the Section on Overrides for more detail.

Load Issues

Load Issues are displayed in the Load manager as colour coded buttons to indicate if one leg (or more) has a **Non Conformance**. The Non Conformance Column in Load Manager displays a coloured block to indicate which leg(s) have the Non Conformance. (See the previous section on Adding a Customer Service Issue)

No Load Issues	Indicates that the current load being viewed is free of Non Conformances
Load Issues	Indicates that at least one leg of the current load consists of one or more orders that have associated Non Conformances.
Load Alerts	Indicates that the load has at least one associated minor load or job (leg) level alert that has not been accepted, this could be a change that has been made to the leg in GTS (details of the change can be seen in the Leg Audit in the Order Pool)
Load Alerts Accepted	Once the Alert has been accepted the load alerts accepted flag will be displayed along with the No Load Issues flag.
Load Overrides	Indicates if a Load Alert has been overridden

Alert Triggers

The following table details the types of event on a load that will trigger an alert. Certain types of alert can be overridden. Alerts can be displayed prior to resource allocation (ESP Admin setting) and will use the default Tractor type on the Job to determine over capacity alerts.

Alert	Details	Alert Type	Corrective Action
Allocation of Driver Resource	The Resource applied has failed the requirements and restrictions checks	Minor or Major (does apply to Trunks)	<ul style="list-style-type: none"> • Remove the Leg from the Load • Select an alternative resource • Change the specific requirements for the leg • If Minor Accept the Alert
Allocation of Trailer Resource	The Resource applied has failed the requirements and restrictions checks	Minor or Major (does not apply to trunks)	<ul style="list-style-type: none"> • Remove the Leg from the Load • Select an alternative resource • Change the specific requirements for the leg • If Minor Accept the Alert
Vehicle Blowout – Weight	<p>The Combined weight of all legs on the load (Peak weight) has exceeded the capacity of the Tractor type the load has been resourced against (can also apply to the trailer type – ESP admin setting – advanced capacity checking)</p> <p>If Capacity Checking in the Order Pool is switched on in ESP Admin this will also apply to unplanned legs in the order pool (Capacity checking will be against the Tractor Type the Leg has been raised with in GTS)</p>	<p>Major (includes Trunks) Cannot Override</p>	<ul style="list-style-type: none"> • Remove the leg from the Load causing the excess • Split the pallet (Sched 1 qty) on the load (Chilled only)
Vehicle Blowout – Sched1	<p>The Combined scheduling equivalent 1 of all Jobs (peak) on the load has exceeded the capacity of the Tractor type the load has been resourced against (can also apply to the trailer type – ESP admin setting – advanced capacity checking)</p>	<p>Minor (includes Trunks) Can Override</p>	<ul style="list-style-type: none"> • Remove the Job from the Load causing the excess • Override the Equiv 1 • Accept the Alert
Vehicle Blowout – Equiv 2	<p>The Combined scheduling equivalent 2 (peak) of all Jobs on the load has exceeded the capacity of the Tractor type the load has been resourced against (can also apply to the trailer type – ESP</p>	<p>Minor (includes Trunks) Can Override</p>	<ul style="list-style-type: none"> • Remove the Job from the Load causing the excess • Override the Equiv 2 • Accept the Alert

	admin setting –advanced capacity checking)		
Vehicle Blowout - Volume (Cube)	The Combined Cube (peak) of all legs on the load has exceeded the capacity of the Tractor type the load has been resourced against (can also apply to the trailer type – ESP admin setting –advanced capacity checking)	Minor(includes Trunks) Can Override	<ul style="list-style-type: none"> • Remove the Job from the Load causing the excess • Override the Cube • Accept the Alert
Job Changes	Applies to Collection or Delivery Address changes or changes to Dates and Times	Minor (does not apply to Trunks)	<ul style="list-style-type: none"> • Accept the Alert
Job Cannot be done	e.g. not possible to achieve the load due to time restrictions for example when legs with different date/time windows have been added to the load	Major	<ul style="list-style-type: none"> • Remove the Job that is causing the timing issue from the load • Override the Travel time of the leg causing the timing issue • Change the load start date and time
Shift Time has surpassed the Pre-defined Max	Applies to loads with a duration that exceeds the Max shift time setting from ESP Admin	Minor	<ul style="list-style-type: none"> • Override the travel time or stop times • Remove the Job that is causing the timing issue from the load • Accept the Alert

Note: See the Overrides section for details of the columns in Load manager that can have Overrides applied, this in turn will effect/change the Alert status of the Load.

Major Alert in the Order Pool

In the example below (Figure 73) the Job in the order pool has a Leg Status of RS, indicating that a Load has been created for the Job. Once the Load has been created ESP checks for Major and Minor Alerts in the Load Manager & Order Pool. Alerts found are displayed in the load manager window and are also visible in the Order Pool, Supplier Bin and Traffic Sheet

Major Alert in the Order Pool:

Order Pool 2 (Items: 1 Dolly: 4.000)								
	Cur Stage	Depot	A.	Job Number	Job Type	Customer Code	Shipper	Collection
	RS	AL		AL/0000019	ST	SBCUST	EAT	TESCO DII

Figure 73

Major Alert for Job in Load Manager:

Load Manager												
Planning Depot: AL ALTRINCHAM DEPOT				Resource Details				Load Size				
Load Id: 238535 COLLECT / DELIVER				Tractor: SBSUBAL Type: SUBC				Weight: 0 (Peak: 0)				
Status: Resourced				Trailer: SBSUBAL Type: SUBC				Dolly: 4.000 (Peak: 4.000)				
Group Id: AL/0000019				Driver: Pierre Wells (SB SUBBIE)				Cube: 4.000 (Peak: 4.000)				
Tel No: 0161 45454				Pallet: 4.000 (Peak: 4.000)								
Load Start Date: 16/05/2016 00:00				Load End Date: 17/05/16 00:10 (Total:24:10)				Alerts				
								No Issues				
								Temp				
								Not Released				
N.	S.	Alert	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival	Stop Time	Stop Departure
			COL - L	AL/0000019	AL	TESCO DIDCOT	0			16/05/16 00:00	10	16/05/16 00:10
			DEL - U	AL/0000019	AL	TESCO DONCA...	1430			17/05/16 00:00	10	17/05/16 00:10
<input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Delete Load"/> <input type="button" value="Create Load"/> <input type="button" value="Remove"/> <input type="button" value="Resource"/> <input type="button" value="Undo"/> <input type="button" value="Apply"/> <input type="text" value="Name :"/> <input type="button" value="..."/> <input type="button" value="Complete"/> <input type="button" value="Debrief"/> <input type="button" value="Despatch"/> <input type="button" value="OK"/> <input type="button" value="Close"/>												
Messages And Alerts Unprocessed Alerts Processed Alerts												
Alert	Alert Description	Reason										
	Job Cannot Be Done											
	Collection Failure											
	Shift time has surpassed the predefined max											
	JOB: AL/0000019 cannot be planned on this load. Earliest possible arrival time: 17/05/16 00:00 - Planned arrival time: 16/0...											

Figure 74

The **Alerts** button is Red indicating a **Major Alert**; Details of the Error are displayed in the Messages and Alerts window at the bottom of the screen.

If the Alert relates to special requirements and features, the details of the Alert are available by Right Clicking on the Alert - Figure 75:

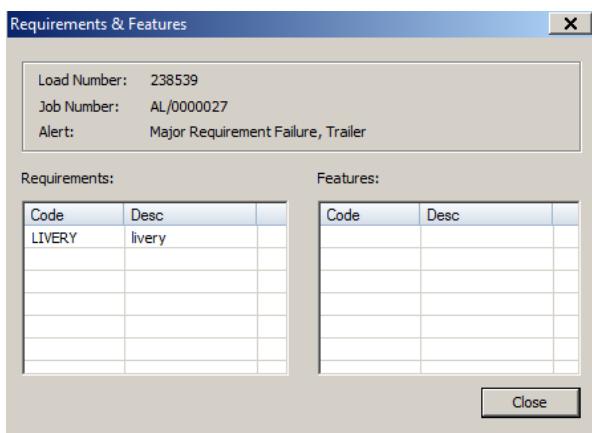
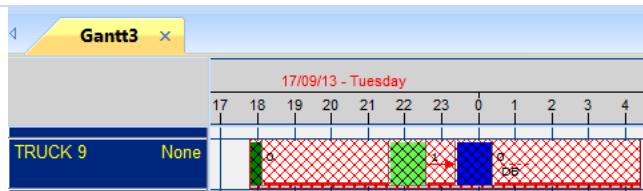
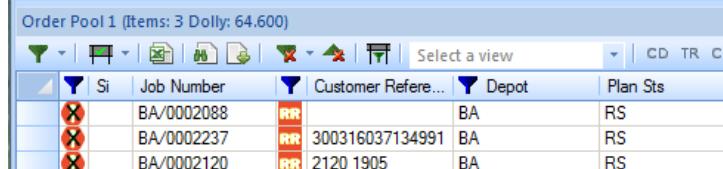


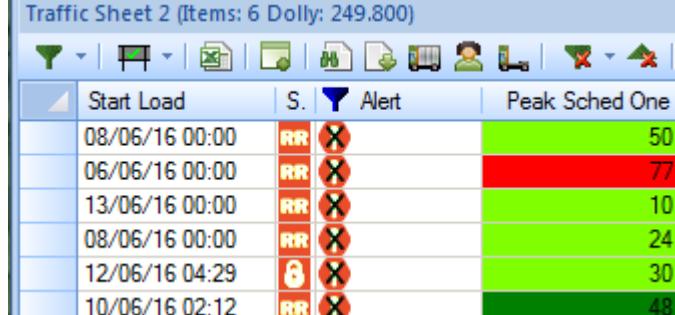
Figure 75

Examples of Major Alert on the Gantt

When a Load is resourced to a vehicle and a major alert is triggered, the load will be hashed in red on the Gantt, in the Order pool and Traffic sheet the load will also be displayed with a Revisit Route Status Symbol and an Alert in the alert column.

Load On the Gantt											
											
17/09/13 - Tuesday											
17	18	19	20	21	22	23	0	1	2	3	4
TRUCK 9	None										

Load in the Order Pool with Status RR (Revisit Route) and Alert										
										
Order Pool 1 (Items: 3 Dolly: 64.600)	Si	Job Number	Customer Refere...	Depot	Plan Sts					
(X)	BA/0002088	RR		BA	RS					
(X)	BA/0002237	RR	300316037134991	BA	RS					
(X)	BA/0002120	RR	2120 1905	BA	RS					

Load in the Traffic Sheet with Status RR (Revisit Route) and Alert										
										
Traffic Sheet 2 (Items: 6 Dolly: 249.800)	Start Load	S.	Alert	Peak Sched One						
08/06/16 00:00	RR	(X)		50						
06/06/16 00:00	RR	(X)		77						
13/06/16 00:00	RR	(X)		10						
08/06/16 00:00	RR	(X)		24						
12/06/16 04:29	RR	(X)		30						
10/06/16 02:12	RR	(X)		48						

In the example above the loads have a requirement for a Liveried Trailer. The Trailer does not have this feature so the load is hashed on the Gantt and displayed with a Revisit Route status icon in the Order Pool.

Resolving Major Alerts on the Gantt

Major Alerts cannot be overridden, they have to be resolved before they are removed from the job.

Firstly determine what the Alert relates to:

1. Locate the Load on the Gantt (the load will be hashed in Red)
2. Double click on the load on the Gantt

The Load Manager window will be displayed:

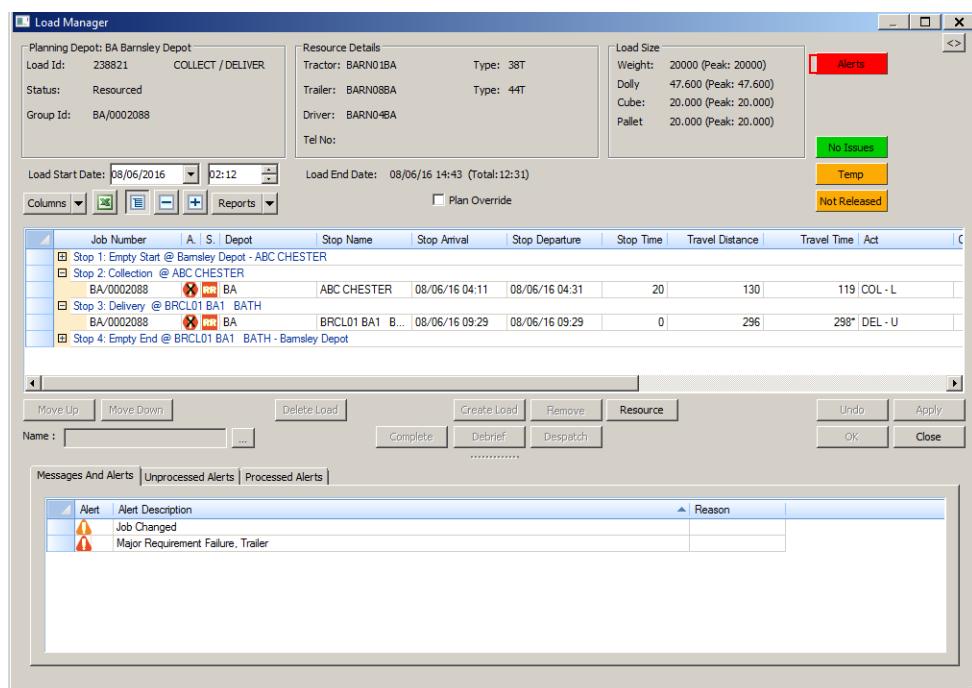


Figure 76

The Load Alerts button will clearly be visible in Red in the top right hand corner of the window (Figure 76)

1. Right Click on the Alert in the Alerts window
2. Click Requirements/Features

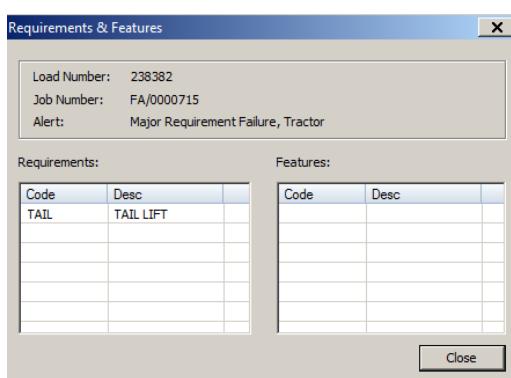


Figure 77

Details of the Alert Requirement will be displayed, in the example above Figure 77 the job has failed against a feature that is required on the Trailer.

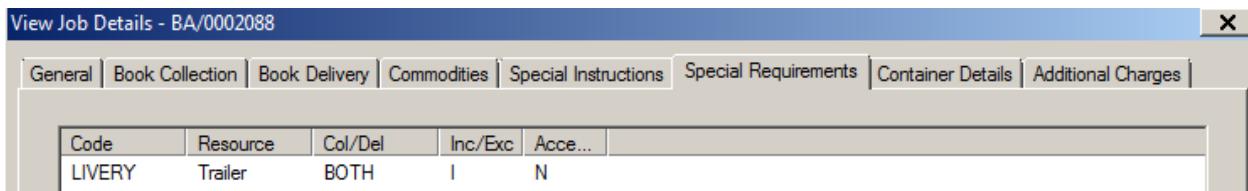
To resolve the Alert the Job will need to be resourced with a Trailer that has the required feature.

Displaying Job Requirements

From the Order Pool:

1. Right Click on the Job
2. Click **Properties**
3. Click the **Requirements** Tab

The Details of the Requirement will be displayed.



Code	Resource	Col/Del	Inc/Exc	Acce...
LIVERY	Trailer	BOTH	I	N

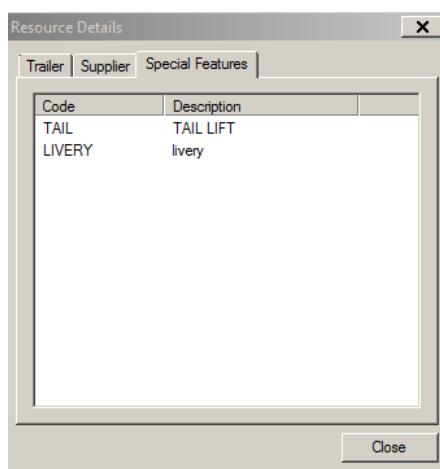
Figure 78

- In the Example above there is a requirement for a Liveried Trailer for the Collection and Delivery that is a Major Alert (The Accept flag is No)
- If the accept flag is set to Yes then the Alert will be treated as a minor alert and can be accepted.

Display a Resource Features

From the Resource window (Traffic Sheet or Load Manager):

1. Ensure that **Suitable Trailers Only/Suitable Tractors Only/Suitable Drivers Only** option is selected in the bottom right hand corner of the resources window
2. Right Click on the Trailer displayed
3. Click Properties
4. Select the **Special Features** tab



Code	Description
TAIL	TAIL LIFT
LIVERY	livery

Figure 79

In the Example above the trailer has a Special feature of a Livery and a Tail Lift

Minor Alerts

Minor Alerts are indicated by an orange Load Alert either in the Order Pool, Traffic Sheet or Load Manager. Some Minor Alerts can be overridden others can only be Accepted. When an Alert is accepted the reason why the alert has been accepted also has to be entered.

- From the Traffic Sheet or Order Pool, locate the load with the Minor Alert:

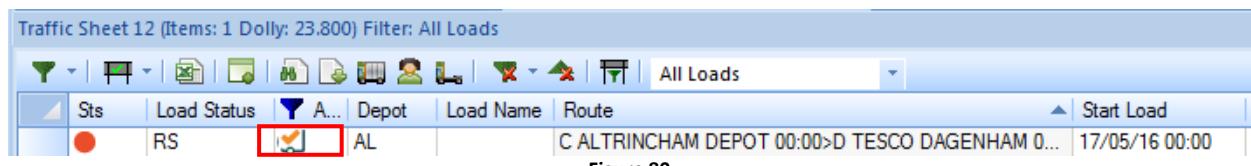


Figure 80

- Open the Load Manager

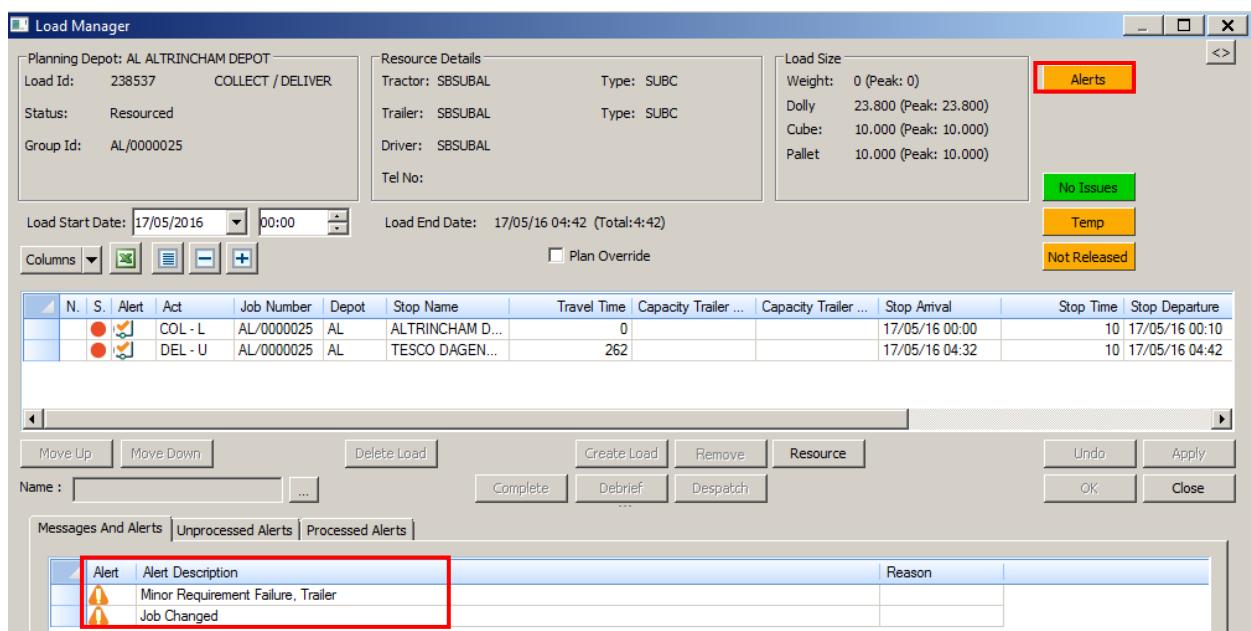


Figure 81

In the example above Load 238537 - the job has been changed

- Right Click on the Job Changed Alert
- Click Accept

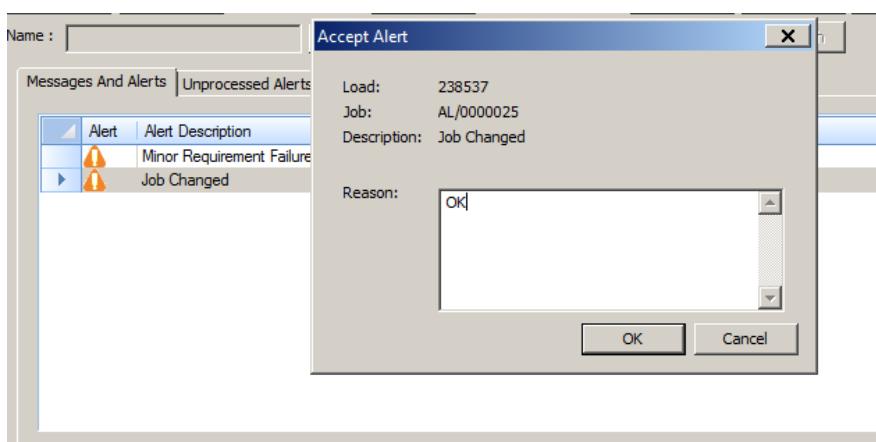


Figure 82

5. Key in a **Reason** to indicate why the Alert has been Accepted
6. Click **OK**
7. The **Accepted** button is displayed in the top right hand corner of the window

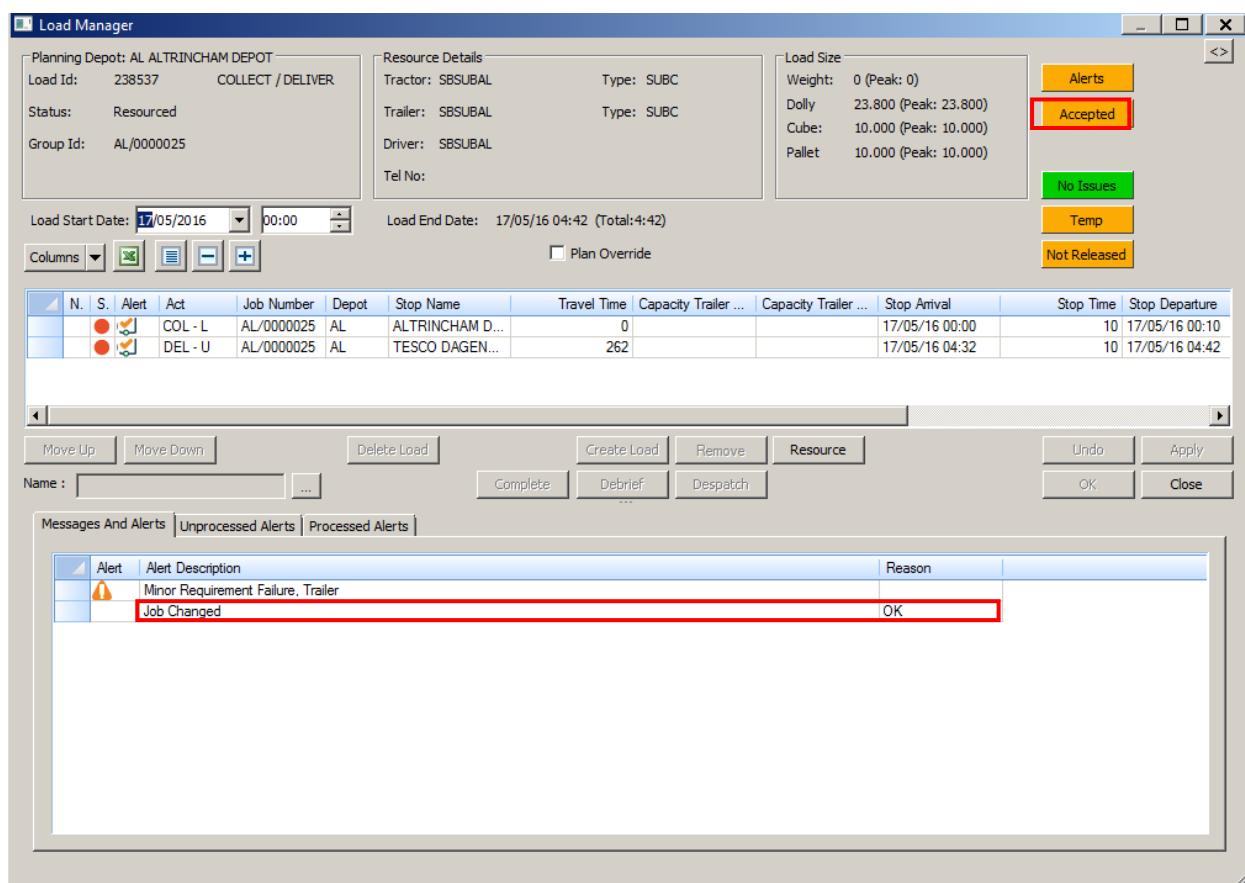


Figure 83

Details of the alert and reason why the alert has been accepted are visible at the bottom of the window. Double click on any processed alert to see the details/reasons why the alert was accepted.

8. Click **Close** to Close the Load Manager Window

Overrides

In the Load Manager some Jobs will display Minor Alerts that can be resolved by overriding values on the load. Changes are made to the values on the load instead of accepting the alert.

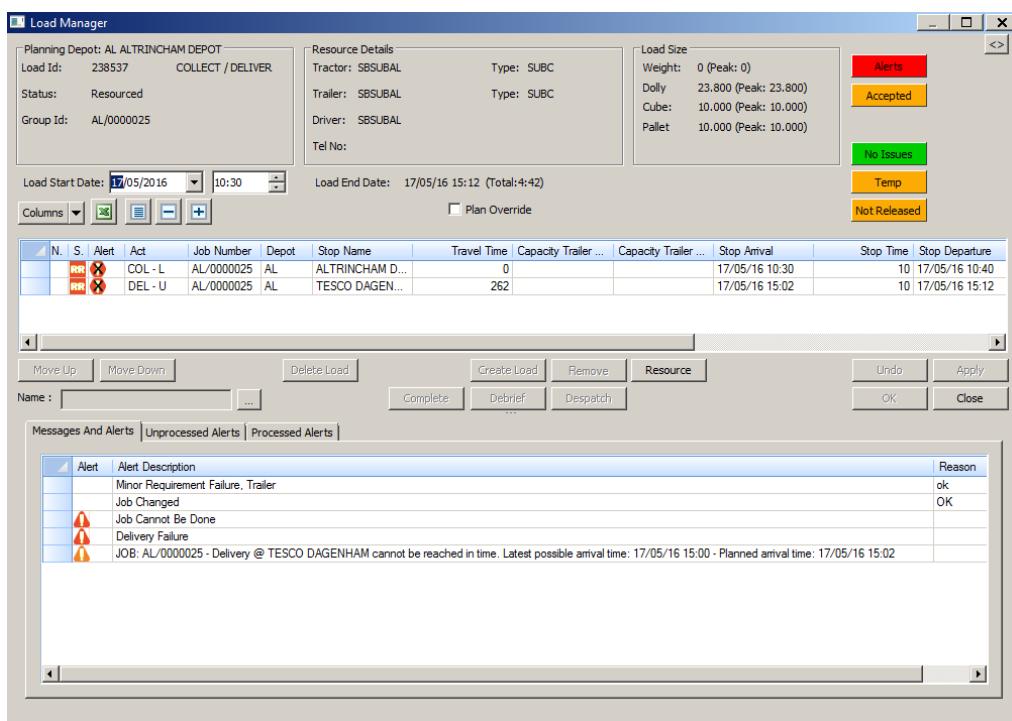
The Following Fields are available for Overrides:

Field Name
Book Time
Earliest/Latest Collection Date/ time
Earliest/Latest Delivery Date/Time
Vehicle Blowout –scheduling Equivalent 1
Vehicle Blowout – Scheduling Equivalent 2
Vehicle Blowout - Volume (Cube)
Stop Time (Minutes)
Stop Arrival Date and Time
Stop Departure Date and Time
Sched 1
Travel Time (Minutes)

Overriding an Alert

In the Example below the Order has a delivery window of 14:00 – 15:00. The Load is Starting at 10.30 so the Planned Arrival Time is 15.02, narrowly missing the delivery slot. This means the order will fail the delivery window (Delivery Failure Alert)

The Load Alerts button is visible to indicate that the job cannot be done



The screenshot shows the Load Manager application window. At the top, it displays the planning depot as AL ALTRINCHAM DEPOT, load ID 238537, and the status as Rесогded. Below this, the resource details show a Tractor (SBSUBAL) and a Trailer (SBSUBAL), both Type: SUBC. The load size information includes weight (0 Peak: 0), dolly (23.800 Peak: 23.800), cube (10.000 Peak: 10.000), and pallet (10.000 Peak: 10.000). On the right side of the header, there are four buttons: 'Alerts' (red), 'Accepted' (yellow), 'No Issues' (green), and 'Temp' (orange). Below these are two more buttons: 'Not Released' (orange) and 'Plan Override' (checkbox). The main area contains a grid of stops. The first stop is 'COL - L' at 'AL/0000025' with a planned arrival time of 10:30. The second stop is 'DEL - U' at 'AL/0000025' with a planned arrival time of 15:02. The grid also includes columns for N, S, Alert, Act, Job Number, Depot, Stop Name, Travel Time, Capacity, Stop Arrival, Stop Time, and Stop Departure. Below the grid are buttons for Move Up, Move Down, Delete Load, Create Load, Remove, Resource, Undo, Apply, Complete, Debrief, Despatch, OK, and Close. At the bottom, there is a 'Messages And Alerts' panel with tabs for Unprocessed Alerts and Processed Alerts. The 'Processd Alerts' tab is selected, showing a list of alerts with descriptions like 'Minor Requirement Failure, Trailer', 'Job Changed', 'Job Cannot Be Done', and 'Delivery Failure'. The 'Reason' column for these alerts shows 'ok' or 'OK'.

Figure 84

The Travel Time can be Overridden to Achieve a Load Arrival time of 15:00 instead of 15:02

From the Load Manager window:

1. Right Click on the column entry to override (in this example it is the **Travel Time**)
2. Select Override

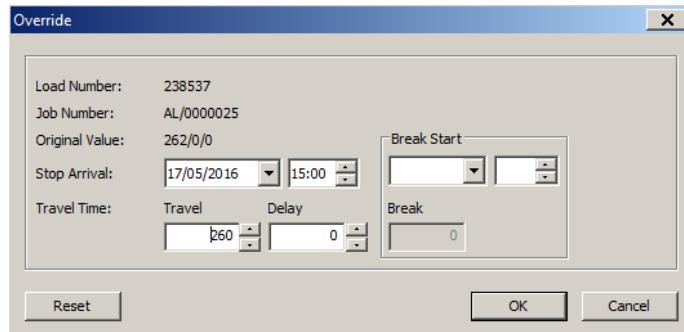
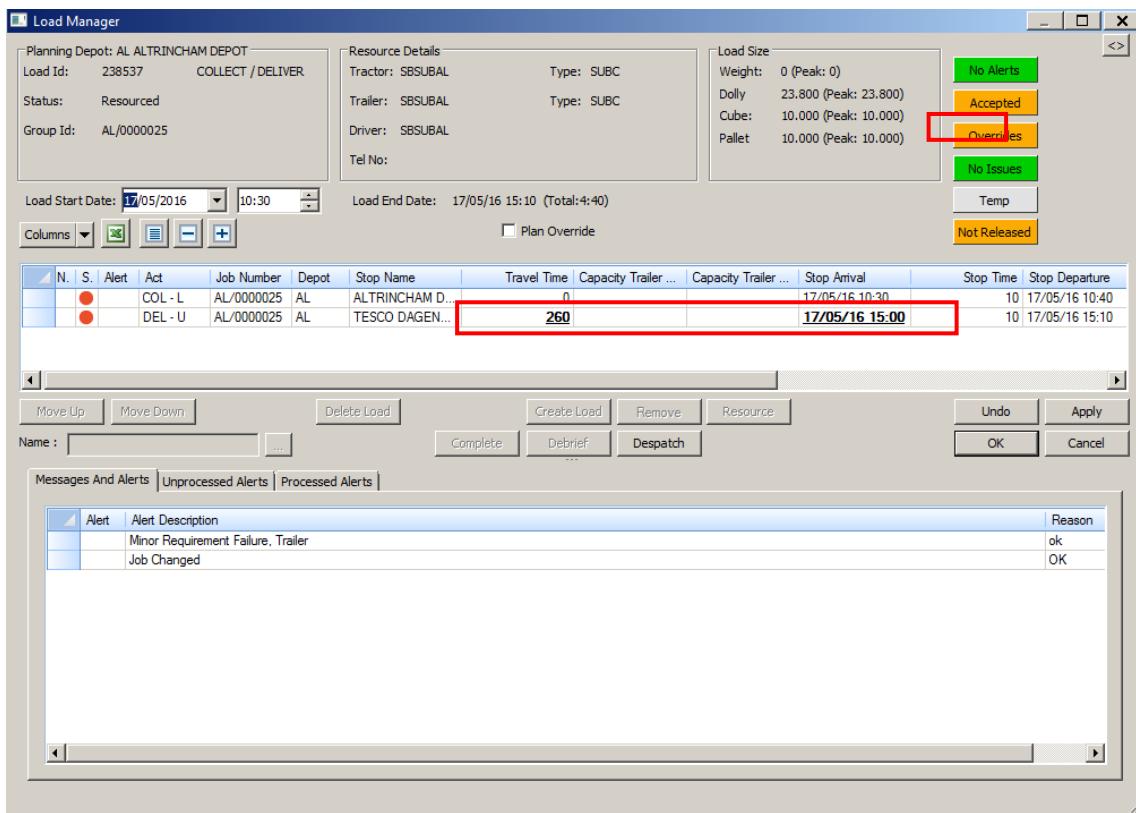


Figure 85

3. Key in the New Travel Time - in this example we are taking 2 minutes off the travel time
4. Click **OK**



The Load Manager window displays the following details:

- Planning Depot:** AL ALTRINCHAM DEPOT
- Load Id:** 238537 **ACTIVITY:** COLLECT / DELIVER
- Status:** Resourced
- Group Id:** AL/0000025
- Resource Details:**
 - Tractor: SBSUBAL Type: SUBC
 - Trailer: SBSUBAL Type: SUBC
 - Driver: SBSUBAL
 - Tel No:
- Load Size:**
 - Weight: 0 (Peak: 0)
 - Dolly: 23.800 (Peak: 23.800)
 - Cube: 10.000 (Peak: 10.000)
 - Pallet: 10.000 (Peak: 10.000)
- Alert Status:** No Alerts, Accepted, Overrides (highlighted with a red box), No Issues, Temp, Not Released
- Load Grid:** Shows two rows of data. The second row's Travel Time cell (containing "260") is highlighted with a red box.
- Buttons:** Move Up, Move Down, Delete Load, Create Load, Remove, Resource, Undo, Apply, OK, Cancel.
- Messages And Alerts:** A table showing alerts and their reasons:

Alert	Alert Description	Reason
Minor Requirement Failure, Trailer		ok
Job Changed		OK

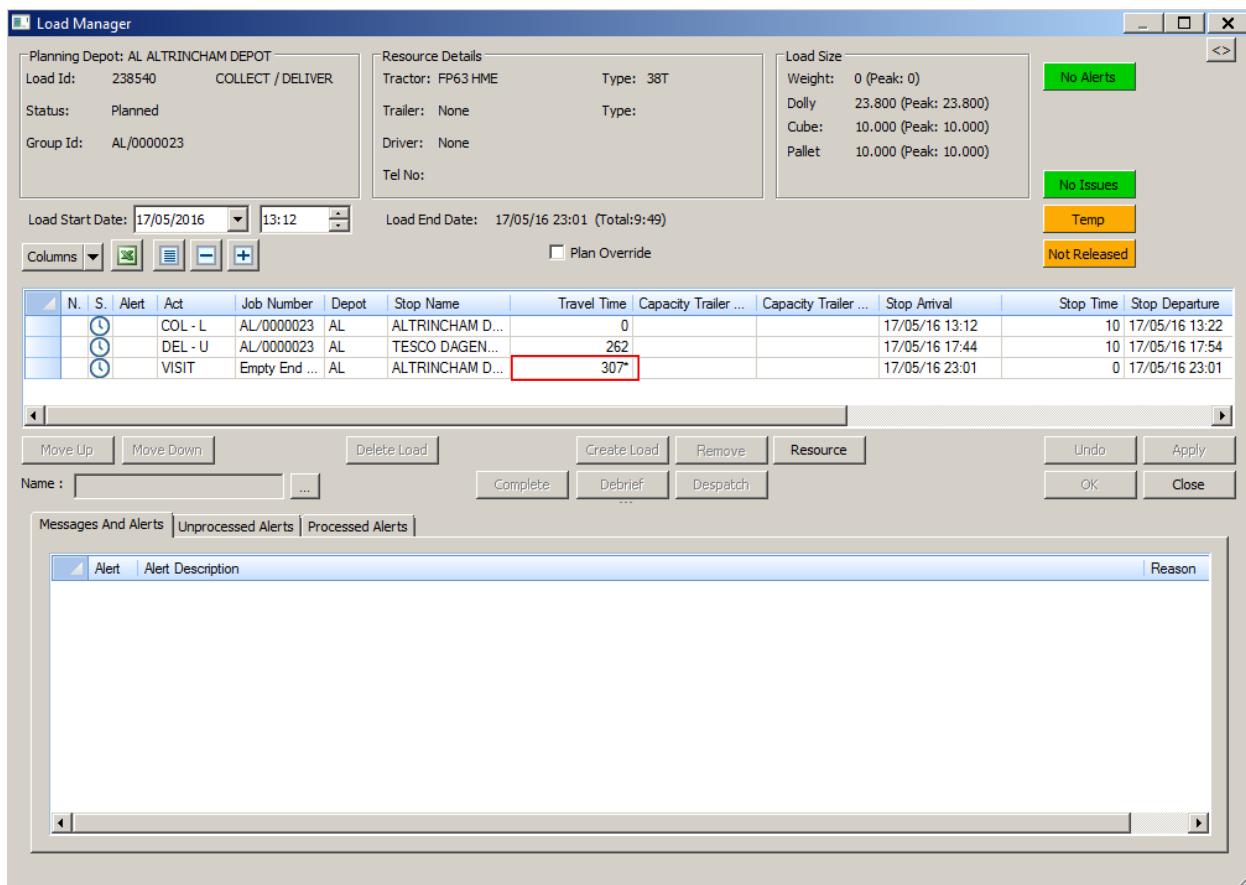
Figure 86

- The Load Overrides Button will now be visible in Load Manager
- The Data in the Columns that have been Overridden will be underlined

Driver Breaks and Overrides

In the Example below the Order has a driver break in the travel block between Tesco Dagenham and the Altrincham Depot. Breaks are highlighted with * in the travel time column. The Break will also be visible on the Gantt chart, the position of the break can be altered if required by using an Override

Break in the Load Manager Window



The Load Manager window displays the following details:

- Planning Depot:** AL ALTRINCHAM DEPOT
- Load Id:** 238540 **COLLECT / DELIVER**
- Status:** Planned
- Group Id:** AL/0000023
- Resource Details:**
 - Tractor: FP63 HME
 - Type: 38T
 - Trailer: None
 - Type:
 - Driver: None
 - Tel No:
- Load Size:**
 - Weight: 0 (Peak: 0)
 - Dolly: 23.800 (Peak: 23.800)
 - Cube: 10.000 (Peak: 10.000)
 - Pallet: 10.000 (Peak: 10.000)
- Alerts:** No Alerts
- Issues:** No Issues
- Override Status:** Temp, Not Released

Load Start Date: 17/05/2016 13:12 **Load End Date:** 17/05/16 23:01 (Total: 9:49)

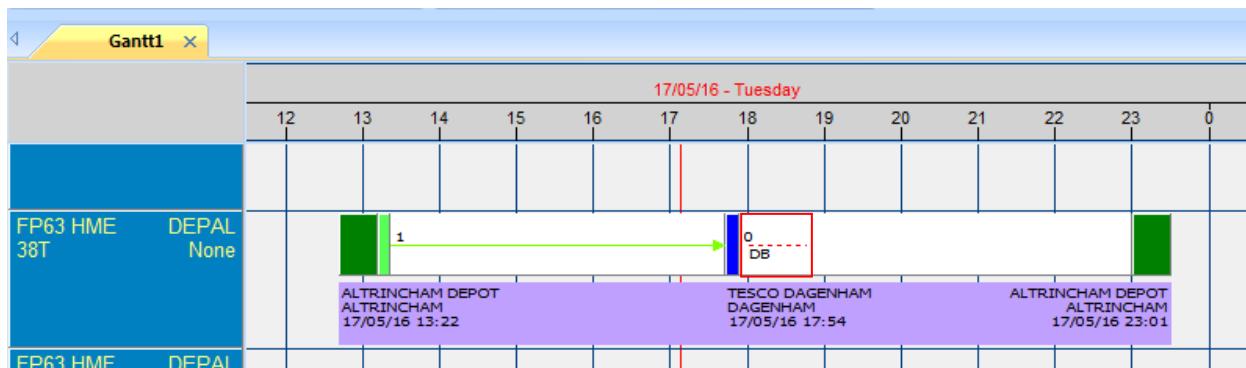
Plan Override:

N.	S.	Alert	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival	Stop Time	Stop Departure
			COL - L	AL/0000023	AL	ALTRINCHAM D...	0			17/05/16 13:12	10	17/05/16 13:22
			DEL - U	AL/0000023	AL	TESCO DAGEN...	262			17/05/16 17:44	10	17/05/16 17:54
			VISIT	Empty End...	AL	ALTRINCHAM D...	307*			17/05/16 23:01	0	17/05/16 23:01

Buttons: Move Up, Move Down, Delete Load, Create Load, Remove, Resource, Undo, Apply, OK, Close.

Messages And Alerts: Alert Description, Reason

Driver Break on the Gantt:

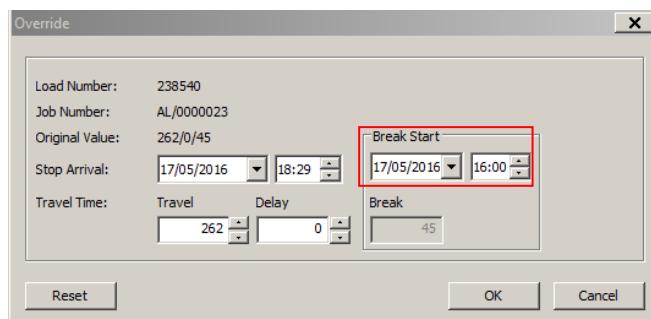


The break start time can be changed by applying an override to the travel time in the load manager.

Change the Driver Break (Override)

From the Load Manager

1. Right Click on the **Travel time** column (in the example below the travel time for the previous leg has been selected)
2. Click **Override**
3. Key in the Break Start (The example below shows a new break starting at 16:00)



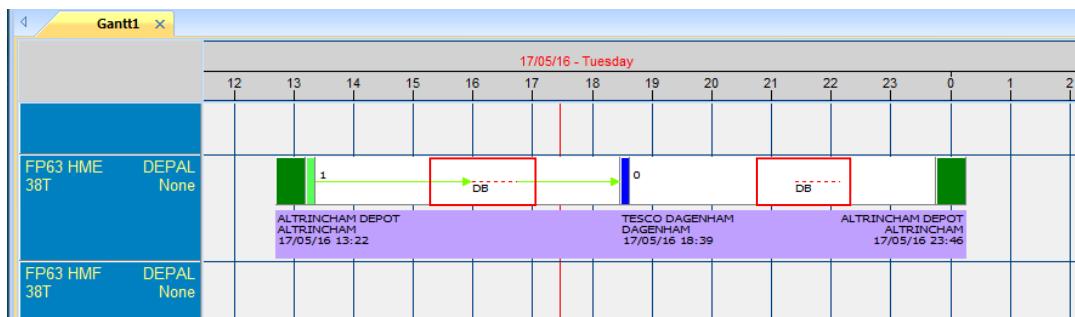
4. Click **OK** and then Click **Apply** in the load manager

(this will cause the break to be positioned correctly in the load and allow any further breaks for onward legs to be calculated correctly)

*The Load now shows further breaks allocated by displaying * in the Travel time column*

N.	S.	Alert	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival	Stop Time	Stop Departure
			COL - L	AL/0000023	AL	ALTRINCHAM D...	0	307	307	17/05/16 13:12	10	17/05/16 13:22
			DEL - U	AL/0000023	AL	TESCO DAGEN...	307			17/05/16 18:29	10	17/05/16 18:39
			VISIT	Empty End ...	AL	ALTRINCHAM D...	307			17/05/16 23:46	0	17/05/16 23:46

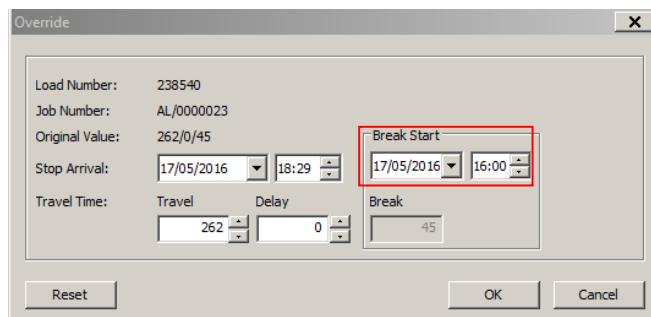
The breaks will also be visible on the Gantt Chart



Reset Driver Breaks (overrides)

From the Load Manager:

1. Right Click on the **Travel time** column then Click **Override**
2. Click the Reset button to reset the override to the original values



Working with Planned Loads

Planning Loads

Loads can be created by selecting an order in the order pool and choosing the create load option, alternatively jobs can be dragged onto the Gantt or into existing loads on the Traffic sheet. Once a job has been assigned to a load, the Load Manager is used to view\change details for the load.

Times for the route are calculated for the distance travelled, collection and delivery, delays and shift activity. On the Gantt chart coloured blocks signify how much time the load is going to take for each activity.

Plan Full Load On Gantt

From the Order Pool:

1. Locate the Job to be planned
2. Click on the Job
3. Drag and drop the Job into the Gantt against the required Tractor
4. Rest the mouse pointer over any part of the load to see details of the activity at that point.(Figure 87)

Note: Tooltips will need to be enabled to see the details below (see section on Customising ESP)

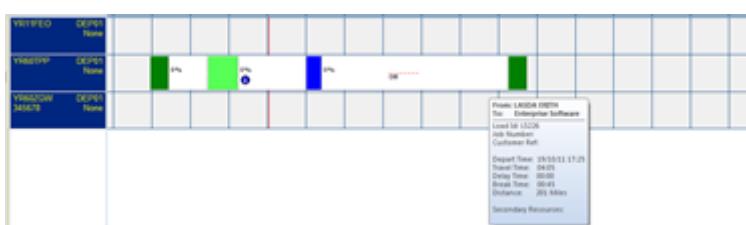


Figure 87

Once a Load has been created the following details will be visible:

Traffic Sheet: (Figure 90)

- The Load will be assigned a Load Number
- Details of the Allocated Resource will be visible
- The Load Status will be PL
- The Load Start Date and Time will be visible
- Details of any Allocated Resource will be visible, once fully resourced the load status will change to RS

Gantt chart

- Once The Load has been assigned tractor resource the load will be visible on the Plan Line against the Vehicle (Figure 88)

Coloured blocks indicate activities for the leg. For example:- the Lime bar (Figure 88) indicates Collection, the Blue bar indicates Delivery Time, the Grey bar indicates travel time, the Green bars at the start and end of the block indicate shift start and end time. The Continuous line indicates travel time; the dashed line indicates break/delay time.

Order Pool

- The Job Will be visible (dependent upon filters) and the Current Planning Stage will be PL(Figure 89)

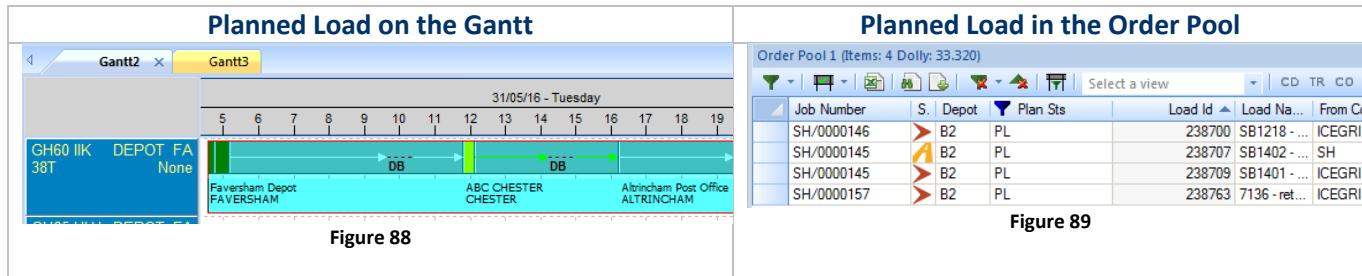


Figure 88

Figure 89

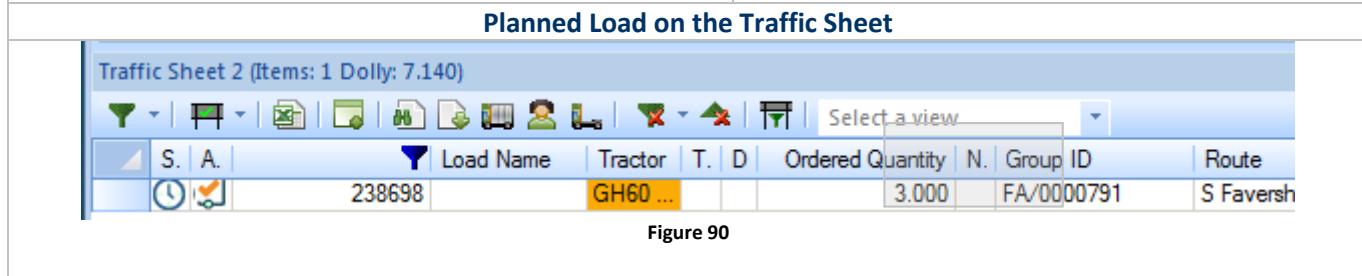
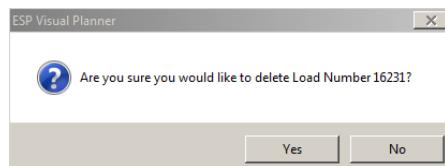


Figure 90

Remove Full Load from the Gantt or Traffic Sheet

- Right Click on the load on the Gantt/Traffic Sheet
- Click **Delete Load**



- Click **Yes**

Reschedule Loads to a different Time (Gantt chart)

Planned loads can be rescheduled to a different time if required (the amount of time available will be determined by any collection or delivery windows on the load)

1. Click on the **Load** on the Gantt
2. Right Click on the **Load** to access the right click menu
3. Click **Reschedule**

Then either

4. Drag the load along the time line on the Gantt to the required time

Or

5. Click on the buttons on the Reschedule Toolbar (Figure 91) to move the load along the time line



Figure 91

Each button will move the load forward by either:
+ 1 minute, + 10 minutes or + 1 hour
Or back by either:
- 1 minute, - 10 minutes or - 1 hour

Reallocate Loads to a different Vehicle (Gantt chart)

1. Click on the **Load** on the Gantt
2. Right Click on the **Load** to access the right click menu
3. Click **Reallocate**
4. Scroll up/down the Gantt to find the vehicle
5. Click on the plan line for the vehicle to reallocate the load

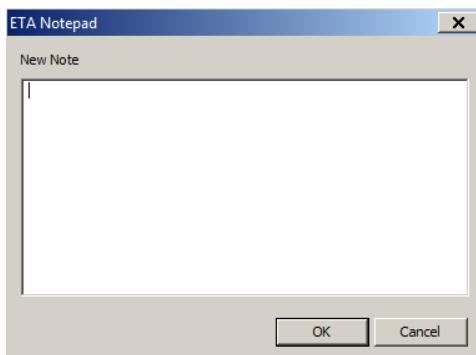
Load Notes Trip Memos and Instructions

There are a few options for adding notes and instructions to loads on the Gantt and Traffic Sheet. Currently there are four columns on the Traffic Sheet that display details relating to Trip Memo or Instruction text. Load Notes are visible on the Gantt Chart

Add Load Note (Gantt chart)

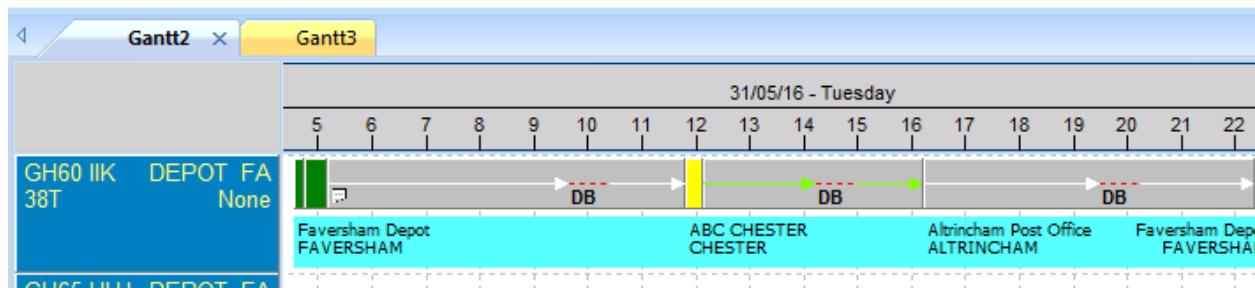
Loads can have a Load Note added on the Gantt (visible on the Gantt)

1. From the Gantt Chart
2. Right Click on the Route
3. Click Add Note



4. Key in the Details of the Load Note and Click OK

The Route will display the load note symbol on the Gantt:



To Edit or remove the load note:

1. Right click on the route on the Gantt
2. Click **Add Note**
3. Add or remove the text and click **OK**

Add Trip Instructions

Loads can have Trip Instructions added to the load

1. From the Gantt Chart or Traffic Sheet
2. Right Click on the Route and Click Trip Instructions

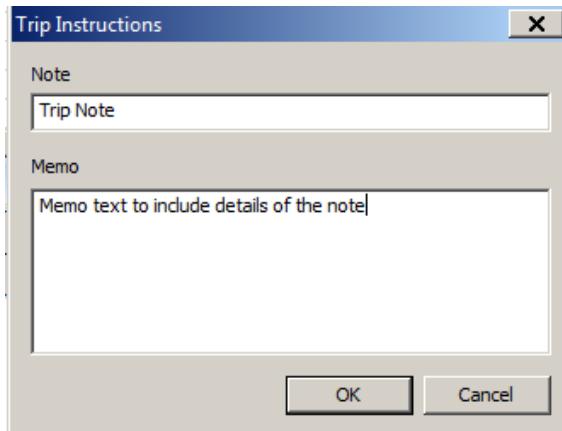


Figure 92

3. Key in the instructions in the Note Field
4. Accompanying text for annotation purposes only can also be entered in the Memo field
5. Click OK to confirm the details

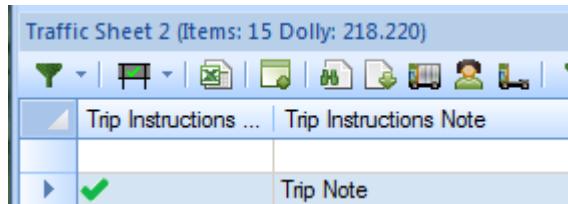


Figure 93

The text entered in the Note field will be visible in the Trip instructions Note field on the Traffic Sheet.

The Trip instructions column will display a Green tick to indicate there is memo text also attached to the note. To view the text right click on the load and select Trip instructions.

Add Trip Memo

Loads can have a Trip Memo added to the load

1. From the Gantt Chart or Traffic Sheet
2. Right Click on the Route and Click Trip Memo
3. Key in the Note in the Note field
4. Key in any memo text in the memo field

The text entered in the Note field will be visible in the Trip Memo field on the Traffic Sheet. The Trip Memo column will display a Green tick to indicate there is memo text also attached to the note. To view the text right click on the load and select Trip Memo.

Start and End Legs

ESP can automatically add start and/or end legs for loads planned against own Fleet or Subcontractor Vehicles. This setting is switched on or off in ESP system Defaults.

Removing start and end legs may be necessary when manipulating the plan to ensure positioning legs go directly between routes.

When an end leg is removed from a load on the Traffic Sheet or Gantt and a subsequent load is planned – the next load will pick up a start leg based on the last leg of the previous load planned on the vehicle.

Add Start/End Legs

This option will only be available where the load has either no end or start leg. This option will be unavailable if an end/start leg already exists on the load.

1. Right Click on a load on the **Traffic Sheet** or **Gantt** that has no start/end leg

The Right Click menu will be displayed

2. Click either **Add Start Leg** or **Add End Leg**

The end/start leg will now be included as part of the route.

Note: If ESP cannot add a start and end leg to a load automatically - the load will be displayed on the Gantt with 'missing leg' arrows (Figure 94) Start and End legs can be added if required using the method above. The arrows can also indicate a mismatch between this leg and the previous/next load planned for the vehicle.

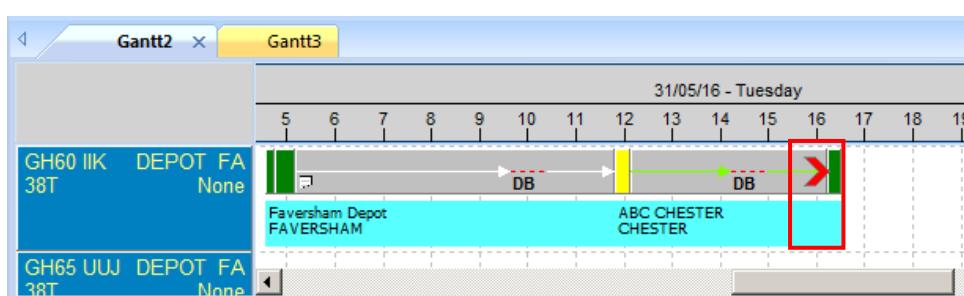


Figure 94

Remove Start/End Legs

1. Right Click on a **load** on the Traffic Sheet/Gantt that has a start/end leg

The Right Click menu will be displayed

2. Click either **Remove Start Leg** or **Remove End Leg**

The end/start leg will now be removed from the route. Start and end legs can also be added and removed using the right click option from the load manager window.

Changing Start/End Leg Point (Adding Visits to Loads)

The Start or End Leg points for a load can be modified by removing the start/end leg then adding a Visit. Visits can also be added at any point in the load to represent a stop that isn't either a collection or delivery.

1. Locate the Load (Gantt or Traffic Sheet)
2. Double Click on the Load to open the Load Manager
3. If necessary, Remove any Start or End legs from the load
4. Click Add Visit
5. The Add Visit window will be displayed

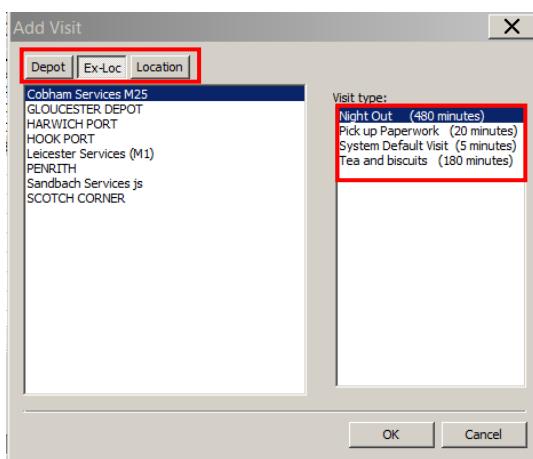
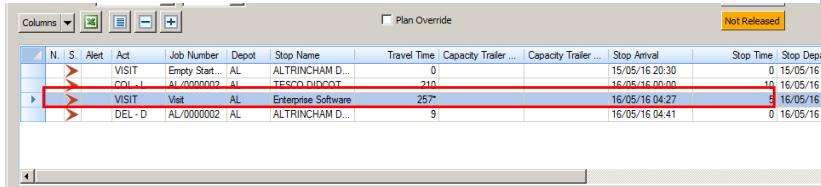
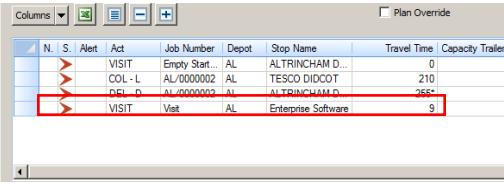


Figure 95

1. Select a Depot from the list or Click on either **Ex-Loc** or **Location** to select from a list of Extraordinary Locations or GTS Location codes
2. Select a Visit Type (this determines the duration of the Visit at the location)
3. Click OK
4. Move the visit to the Start/End or Correct point in the Load

Note: Visits added to the end of a load may need moving to ensure they are sequenced correctly in the load.

Visit added to Load needs moving down to sequence at the end of the load	Visit moved down to sequence at the correct point in the load
	

Edit Times Traffic Sheet (Load Manager Override)

The times of any point on a journey can be manually adjusted on the Traffic Sheet via the Load Manager. The Load Override function is used to override the times (see the override section in this guide)

Multiple Load/Unload

When more than one job is being delivered at a stop it is possible to load the jobs separately at the location using the Multiple Load/Unload function.

Apply a Multiple Load/Unload:

1. From the Load Manager Window
2. Right Click on the Job in the load
3. Select Multiple Load/Unload

Remove a Multiple Load/Unload:

1. From the Load Manager Window
2. Right Click on the Job in the load
3. Select Undo Multiple Load/Unload

Load before Multiple Load/Unload at Didcot (10 minutes total for loading)

Alert	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival	Stop Time	Stop Departure	Tr...
	COL - L	AL/0000020	AL	TESCO DIDCOT	0			17/05/16 00:00	10	17/05/16 00:10	
	COL - L	AL/0000019	AL	TESCO DIDCOT	0			17/05/16 00:00	10	17/05/16 00:10	
	DEL - U	AL/0000020	AL	TESCO DONCA...	214			17/05/16 03:44	10	17/05/16 03:54	
	DEL - U	AL/0000019	AL	TESCO DONCA...	214			17/05/16 03:44	10	17/05/16 03:54	

Figure 96

Load after Multiple Load Unload at Didcot (20 minutes total for unloading)

Alert	Act	Job Number	Depot	Stop Name	Travel Time	Capacity Trailer ...	Capacity Trailer ...	Stop Arrival	Stop Time	Stop Departure	Tr...
	COL - L	AL/0000020	AL	TESCO DIDCOT	0			17/05/16 00:00	10	17/05/16 00:10	
	COL - L	AL/0000019	AL	TESCO DIDCOT	0			17/05/16 00:10	10	17/05/16 00:20	
	DEL - U	AL/0000020	AL	TESCO DONCA...	214			17/05/16 03:54	10	17/05/16 04:04	
	DEL - U	AL/0000019	AL	TESCO DONCA...	214			17/05/16 03:54	10	17/05/16 04:04	

Figure 97

Booking In Collections and Deliveries

Jobs can be booked in for collection or delivery from the Order Pool or Load Manager. Jobs can also be created with a booking in requirement; this will trigger an alert if the jobs haven't been booked in when they are allocated to a load.

Booking in from the Load Manager, or Order Pool:

4. Right Click on the Job, Select Pre-Book Delivery or Pre Book-Collection



Figure 98

5. Key in the Following details:

Contact Details

These will default in from the location master file, details of a Contact Name, Telephone Number and e-mail address can also be entered here. Note: Any details entered or changed in these fields can update the Contact details held in the GTS Location Master File. When the Contact details have been entered click Yes when prompted to make the changes permanent, the contact details will then be updated in GTS.

Booking Details

From and To Dates/Times – Select the relevant Dates and Times for the Collection/Delivery Window

Fixed Time – Select this option to set the Booking time to a fixed window (this will disable the To Date and Time field) The Date and Time entered in the From Field will be used as the Fixed Collection/Delivery Time.

Booking – Key in the Booking Reference for the Job

Delivery/Collection – Key in the Delivery or Collection Reference for the Job

6. Click OK

Booking in and the Pre-Book Status Flag

The Pre-Book Status flag in the order pool will change colour from Red to Green to indicate the Job has been Booked in.  indicates Collection,  indicates Delivery,  indicates the booking in requirement was for both collection and delivery. The icons will be red prior to booking in to indicate that booking in is required, the icons will change colour to green when booking in has been completed

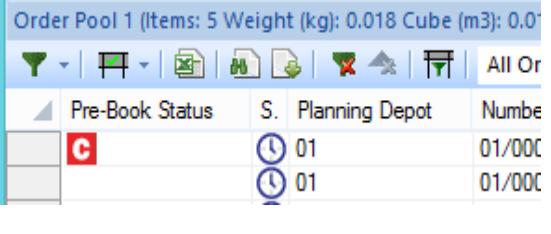
Job in the order pool with Collection Booking in Requirement	Job in the order pool after Booking in
<p>Order Pool 1 (Items: 5 Weight (kg): 0.018 Cube (m3): 0.01</p> 	<p>Order Pool 1 (Items: 5 Weight (kg): 0.018 Cube (m3): 0.01</p> 

Figure 99

Booking in and the Sts Icon

The sts icon for the job in the order pool will be displayed as a green clock to indicate that the order has a time associated with either the collection or delivery.	
Orders that have open windows or haven't been booked in for collection or delivery will display the standard clock symbol in the order pool	

Booking in Alerts

If the job has a booking in requirement, and is subsequently allocated to a load without being booked in, the pre-book alert will be displayed in the messages and alerts section of the load manager

Alert in the Load Manager				
<p>Messages And Alerts Unprocessed Alerts Processed Alerts</p> <table border="1"> <thead> <tr> <th>Alert</th> <th>Alert Description</th> </tr> </thead> <tbody> <tr> <td></td> <td>Collection Requires Pre-Booking</td> </tr> </tbody> </table>	Alert	Alert Description		Collection Requires Pre-Booking
Alert	Alert Description			
	Collection Requires Pre-Booking			

Unbook Collections or Deliveries (Order Pool)

Booking in details can be removed from Jobs by using the Unbook function from the order pool:

1. From the Order Pool
2. Right Click on the Job
3. Select Unbook Delivery or Unbook-Collection

Automatic Booking in/Unbooking within the load manager

When an order is merged with a stop that has either collection or delivery booked in, the booking in details will be copied over to the order. If the order is then moved to another position in the load (after a different stop or at the end of the load) then the booking in time will be removed.

The first order in the load below has been booked in for collection, when the second order in the load is moved up to merge it in with the booked in stop, the order will inherit the booking in times.

Before moving the order up to merge with the stop

Planning Depot: AL ALTRINCHAM DEPOT Load Id: 619 COLLECT / DELIVER Status: Planned Group Id: AL/0000011	Resource Details Tractor: None Trailer: None Driver: None Tel No:	Load Size Weight: 4 (Peak: 2) Pallet: 4.000 (Peak: 2.000) Cube: 0.004 (Peak: 0.002) Pieces: 2.000 (Peak: 1.000)	No Alerts Accepted No Issues																																																																												
Load Start Date: 24/04/2018 01:00		Load End Date: 24/04/18 22:20 (Total:21:20)	<input type="checkbox"/> Plan Override																																																																												
Columns																																																																															
<table border="1"> <thead> <tr> <th>Pre-Book Status</th> <th>S.</th> <th>AI...</th> <th>C...</th> <th>Curr...</th> <th>Customer Name</th> <th>Cust Ref</th> <th>Action</th> <th>Number</th> <th>S.</th> <th>Stop Name</th> <th>Tr...</th> <th>Tr...</th> <th>Stop Arrival</th> <th>Stop Departure</th> <th>Tract</th> </tr> </thead> <tbody> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST7</td> <td>COL - L</td> <td>AL/0000009</td> <td>1</td> <td>The Bungalow H...</td> <td>0</td> <td>0</td> <td>24/04/18 01:00</td> <td>24/04/18 01:29</td> <td></td> </tr> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST7</td> <td>DEL - U</td> <td>AL/0000009</td> <td>2</td> <td>Sea Breeze</td> <td>335</td> <td>378*</td> <td>24/04/18 07:47</td> <td>24/04/18 08:31</td> <td></td> </tr> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST8</td> <td>COL - L</td> <td>AL/0000010</td> <td>3</td> <td>The Bungalow H...</td> <td>335</td> <td>378*</td> <td>24/04/18 14:49</td> <td>24/04/18 15:18</td> <td></td> </tr> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST8</td> <td>DEL - U</td> <td>AL/0000010</td> <td>4</td> <td>Sea Breeze</td> <td>335</td> <td>378*</td> <td>24/04/18 21:36</td> <td>24/04/18 22:20</td> <td></td> </tr> </tbody> </table>				Pre-Book Status	S.	AI...	C...	Curr...	Customer Name	Cust Ref	Action	Number	S.	Stop Name	Tr...	Tr...	Stop Arrival	Stop Departure	Tract	C	PL	C&D	SB Customer		SBCUST7	COL - L	AL/0000009	1	The Bungalow H...	0	0	24/04/18 01:00	24/04/18 01:29		C	PL	C&D	SB Customer		SBCUST7	DEL - U	AL/0000009	2	Sea Breeze	335	378*	24/04/18 07:47	24/04/18 08:31		C	PL	C&D	SB Customer		SBCUST8	COL - L	AL/0000010	3	The Bungalow H...	335	378*	24/04/18 14:49	24/04/18 15:18		C	PL	C&D	SB Customer		SBCUST8	DEL - U	AL/0000010	4	Sea Breeze	335	378*	24/04/18 21:36	24/04/18 22:20	
Pre-Book Status	S.	AI...	C...	Curr...	Customer Name	Cust Ref	Action	Number	S.	Stop Name	Tr...	Tr...	Stop Arrival	Stop Departure	Tract																																																																
C	PL	C&D	SB Customer		SBCUST7	COL - L	AL/0000009	1	The Bungalow H...	0	0	24/04/18 01:00	24/04/18 01:29																																																																		
C	PL	C&D	SB Customer		SBCUST7	DEL - U	AL/0000009	2	Sea Breeze	335	378*	24/04/18 07:47	24/04/18 08:31																																																																		
C	PL	C&D	SB Customer		SBCUST8	COL - L	AL/0000010	3	The Bungalow H...	335	378*	24/04/18 14:49	24/04/18 15:18																																																																		
C	PL	C&D	SB Customer		SBCUST8	DEL - U	AL/0000010	4	Sea Breeze	335	378*	24/04/18 21:36	24/04/18 22:20																																																																		
<input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Send Load Plan"/> <input type="button" value="Delete Load"/> <input type="button" value="Create Load"/> <input type="button" value="Remove"/> <input type="button" value="Resource"/> <input type="button" value="Lock Plan"/> <input type="button" value="Undo"/> <input type="button" value="Apply"/> <input type="text" value="Name :"/> <input type="button" value="..."/> <input type="button" value="Complete"/> <input type="button" value="Debrief"/> <input type="button" value="Despatch"/> <input type="button" value="OK"/> <input type="button" value="Close"/>																																																																															
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After moving the order up to merge with the stop

Planning Depot: AL ALTRINCHAM DEPOT Load Id: 619 COLLECT / DELIVER Status: Planned Group Id: AL/0000011	Resource Details Tractor: None Trailer: None Driver: None Tel No:	Load Size Weight: 4 (Peak: 4) Pallet: 4.000 (Peak: 4.000) Cube: 0.004 (Peak: 0.004) Pieces: 2.000 (Peak: 2.000)	No Alerts Accepted No Issues																																																																												
Load Start Date: 24/04/2018 01:00		Load End Date: 24/04/18 08:39 (Total:7:39)	<input type="checkbox"/> Plan Override																																																																												
Columns																																																																															
<table border="1"> <thead> <tr> <th>Pre-Book Status</th> <th>S.</th> <th>AI...</th> <th>C...</th> <th>Curr...</th> <th>Customer Name</th> <th>Cust Ref</th> <th>Action</th> <th>Number</th> <th>S.</th> <th>Stop Name</th> <th>Tr...</th> <th>Tr...</th> <th>Stop Arrival</th> <th>Stop Departure</th> <th>Tract</th> </tr> </thead> <tbody> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST7</td> <td>COL - L</td> <td>AL/0000009</td> <td>1</td> <td>The Bungalow H...</td> <td>0</td> <td>0</td> <td>24/04/18 01:00</td> <td>24/04/18 01:33</td> <td></td> </tr> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST8</td> <td>COL - L</td> <td>AL/0000010</td> <td>1</td> <td>The Bungalow H...</td> <td>0</td> <td>0</td> <td>24/04/18 01:00</td> <td>24/04/18 01:33</td> <td></td> </tr> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST7</td> <td>DEL - U</td> <td>AL/0000009</td> <td>2</td> <td>Sea Breeze</td> <td>335</td> <td>378*</td> <td>24/04/18 07:51</td> <td>24/04/18 08:39</td> <td></td> </tr> <tr> <td>C</td> <td>PL</td> <td>C&D</td> <td>SB Customer</td> <td></td> <td>SBCUST8</td> <td>DEL - U</td> <td>AL/0000010</td> <td>2</td> <td>Sea Breeze</td> <td>335</td> <td>378*</td> <td>24/04/18 07:51</td> <td>24/04/18 08:39</td> <td></td> </tr> </tbody> </table>				Pre-Book Status	S.	AI...	C...	Curr...	Customer Name	Cust Ref	Action	Number	S.	Stop Name	Tr...	Tr...	Stop Arrival	Stop Departure	Tract	C	PL	C&D	SB Customer		SBCUST7	COL - L	AL/0000009	1	The Bungalow H...	0	0	24/04/18 01:00	24/04/18 01:33		C	PL	C&D	SB Customer		SBCUST8	COL - L	AL/0000010	1	The Bungalow H...	0	0	24/04/18 01:00	24/04/18 01:33		C	PL	C&D	SB Customer		SBCUST7	DEL - U	AL/0000009	2	Sea Breeze	335	378*	24/04/18 07:51	24/04/18 08:39		C	PL	C&D	SB Customer		SBCUST8	DEL - U	AL/0000010	2	Sea Breeze	335	378*	24/04/18 07:51	24/04/18 08:39	
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Messages And Alerts Unprocessed Alerts Processed Alerts																																																																															

Changing the Load Name

The Load name can be changed from the right click menu on the Traffic Sheet, Order Pool, Supplier Bin or Gantt Chart.

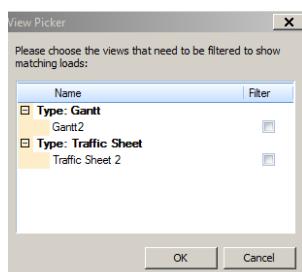
1. Right Click on the Order or Load
2. Click **Change Name**
3. Key in the **New Name**
4. Click **OK**

Filter Routes based on Find Matching (Traffic Sheet & Gantt)

The Traffic Sheet and Gantt Chart can be filtered to show loads that will match the job selected in the order pool. The following is taken into consideration for the filtering:

- Collection Location on the Job matches a stop location on the load to be displayed
- The planned arrival time for the stop is within the collection window on the order

1. From the Order Pool:
2. Right Click on the Job
3. Select Find Available Loads



11. Select the Gantt chart and/or Traffic Sheet to be filtered and Click OK

The Gantt Chart and Traffic Sheet will be filtered to show matching loads accordingly.

To Remove the filters:

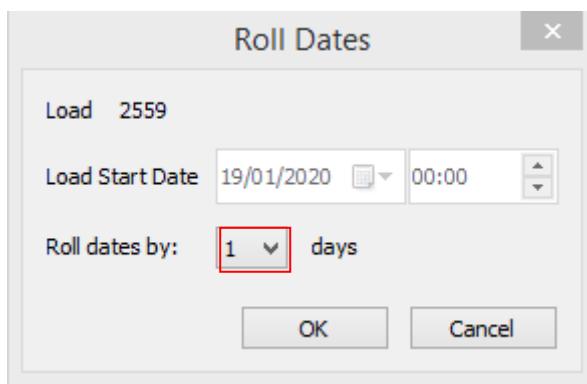
12. Traffic Sheet Toolbar Click 
13. Gantt Chart, Right Click on the vehicle bar and Click Show All.

Roll Dates Function

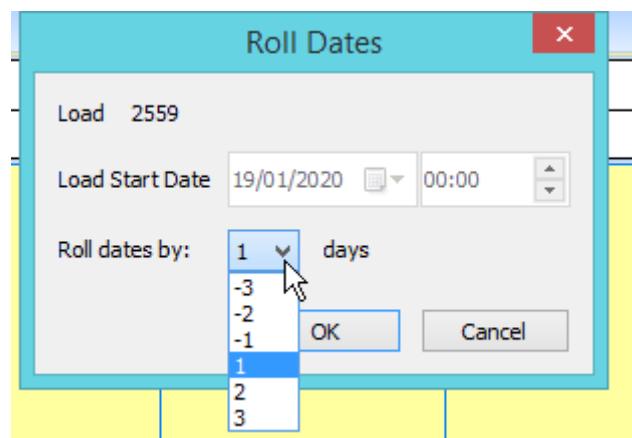
Loads can have their dates rolled forwards or backwards using the roll dates function from the traffic sheet. This function can only be used with loads at PL status that have no resources allocated. Once any resource is allocated the function will not be available.

- Roll Dates can be used to change the load start date
- Roll Dates will also change the times on the jobs on the load, this includes the job requested time and also any booked in times that have been applied

1. From the Traffic Sheet, Right Click on the Load
2. Select Roll Dates



3. Select the number of days backwards or forwards



4. Select the number of days backwards or forwards, then Click OK

The Load start date and also dates on the jobs will be changed in accordance with the number of days chosen.

Collection Legs

When an order is a Collect/Deliver (Collecting from a GTS Location code other than a depot and delivering to a location code other than a depot), ESP can generate a collection leg bringing the Collection back into the depot. Subsequent Delivery legs can then be trunked if required (see the trunking section). Collection legs can be created from the order pool or from the load manager.

Collection Legs

Create Collection Leg from the Order Pool

1. Select the Job in the Order Pool
2. Right Click on the Job
3. Select

The Collection and Delivery Legs will be visible in the Order Pool

Job before Create Collection Leg													
Order Pool 2 (Items: 4 Dolly: 134.000)													
	Cur Type	Cur Stage	Depot	A.	Sts	P.	Job Num...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	C&D	NP	AL				AL/0000032	ST	SBCUST	TESCO DIDCOT	TESCO DONCA...	TESCO DONCASTER	30.000

Collection Leg													
Order Pool 2 (Items: 16 Dolly: 329.340)													
	Cur Type	Cur Stage	Depot	A.	Sts	P.	Job Num...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	COL	NP	AL				AL/0000032	ST	SBCUST	TESCO DIDCOT	ALTRINCHAM D...	TESCO DONCASTER	30.000

Delivery Leg													
Order Pool 2 (Items: 7 Dolly: 159.120)													
	Cur Type	Cur Stage	Depot	A.	Sts	P.	Job Num...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	DEL	NP	AL				AL/0000032	ST	SBCUST	ALTRINCHAM DEPOT	TESCO DONCA...	TESCO DONCASTER	30.000

- The example above shows a Job before and after a Collection leg has been created. Once the Collection leg has been created the leg is split into a Collection and a Delivery.
- Legs can then be trunked to other depots, extraordinary locations/locations for changeovers and overnights
- Jobs can be split into many legs including mid trunks if required

Deleting Collection Leg (Restoring the Job to its previous state) Order Pool

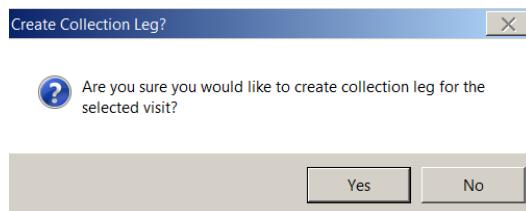
1. Select the Collection leg in the order pool
2. Right Click on the collection leg
3. Select Merge Delivery Leg

Note: if the collection leg is in a load the remove drop off function can be used to merge the delivery leg, this will create a CD job in the load.

Create Collection Leg from the Load Manager

From the Load Manager window:

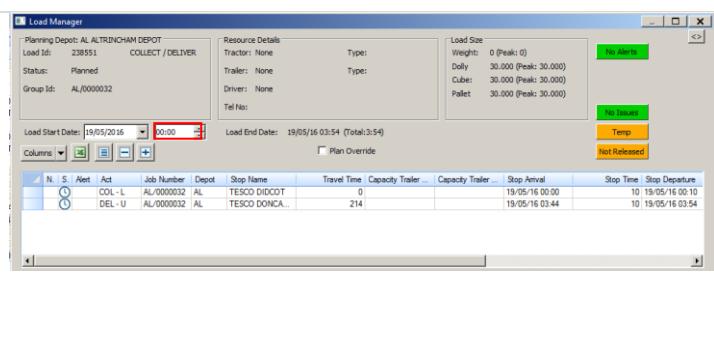
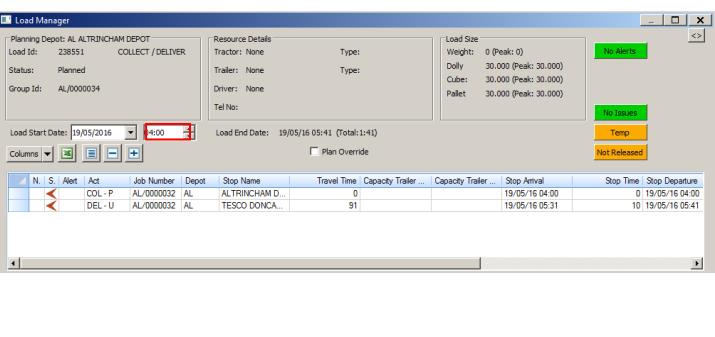
1. Right Click on the Job
2. Select Create Collection Leg



5. Click Yes

The delivery leg will be retained in the load manager, the Collection leg will be placed in the order pool.

Note: The load start time may need adjusting to allow enough time for the collection leg to arrive back at the depot.

Load before the Collection Leg	Load after creating the Collection Leg
 <p>This screenshot shows the Load Manager interface before creating a collection leg. It displays a single delivery leg from AL/0000032 to TESCO DIDCOT. The load start time is set to 19/05/16 03:54, and the load end time is set to 19/05/16 03:54 (Total: 0:00). The collection leg has not yet been created.</p>	 <p>This screenshot shows the Load Manager interface after creating a collection leg. It now displays two legs: a delivery leg from AL/0000032 to TESCO DIDCOT, and a collection leg from TESCO DIDCOT back to AL/0000032. The collection leg's start time is set to 19/05/16 04:00, and its end time is set to 19/05/16 05:41 (Total: 1:41). The original delivery leg's start time remains at 03:54.</p>

Remove Collection Leg from the Load Manager

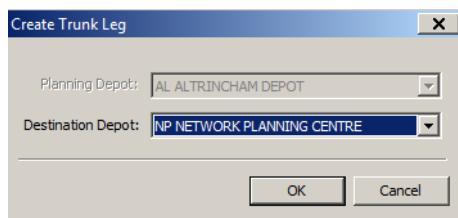
1. Right Click on the Collection Leg
2. Select Remove Collection Leg
3. The Collection leg will be removed from the Load (the order in the load will now be collection point to delivery point)

Trunk Legs

Trunk Legs can be created for Collect Deliver (CD) Jobs in the order pool. The Job will be split into a collection leg, trunk leg and delivery leg. The legs can then be planned on loads as required.

Create Trunk Leg in the Order Pool

1. Select the Job in the Order Pool
2. Right Click on the Job
3. Click Create Trunk Leg



6. Select the **Destination Depot**, Click **OK**

The Collection, Trunk and Delivery Legs will be visible in the Order Pool

Job before Create Trunk Leg													
Order Pool 2 (Items: 15 Dolly: 299.340)													
	Cur Type	Cur Stage	Depot	A.	Sts	P.	Job Num...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	C&D	PL	AL				AL/0000032	ST	SBCUST	TESCO DIDCOT	TESCO DONCA...	TESCO DONCASTER	30.000

Collection Leg, Trunk Leg and Delivery Leg in the Order Pool													
Order Pool 2 (Items: 3 Dolly: 150.000)													
	Cur Type	Cur Stage	Depot	A.	Sts	P.	Job Nu...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	COL	NP	AL				AL/0000031	ST	SBCUST	TESCO DIDCOT	ALTRINCHAM D...	TESCO DONCASTER	50.000
	DEL	NP	NP				AL/0000031	ST	SBCUST	NETWORK PLANNIN...	TESCO DONCA...	TESCO DONCASTER	50.000
	TRK	NP	AL				AL/0000031	ST	SBCUST	ALTRINCHAM DEPOT	NETWORK PLA...	TESCO DONCASTER	50.000

Merge Trunk Leg in the Order Pool

1. Select the Collection leg in the Order Pool
2. Right Click on the Leg and Select Merge Delivery Leg
3. Click Yes to confirm the Merge

The Job will now be visible as a C&D Type job in the order pool

Open Next Load

Loads that contain the onward legs for Jobs in a load can be opened using the Open Next Load function.

From the Load Manager Window:

1. **Right Click** on the Leg
2. Select Open Next Load

The Load that includes the onward leg will be opened

Route Via

Once a Load has been built the 'Route Via' function can be used to re-route either all or some of the Jobs in the load. This will result in secondary legs being created from the 'Route Via' Location to the Delivery point.

Create Route Via from Load Manager

1.

1. Select the Delivery Leg(s) that need to be Routed differently (Use Ctrl + Click to select or deselect legs)

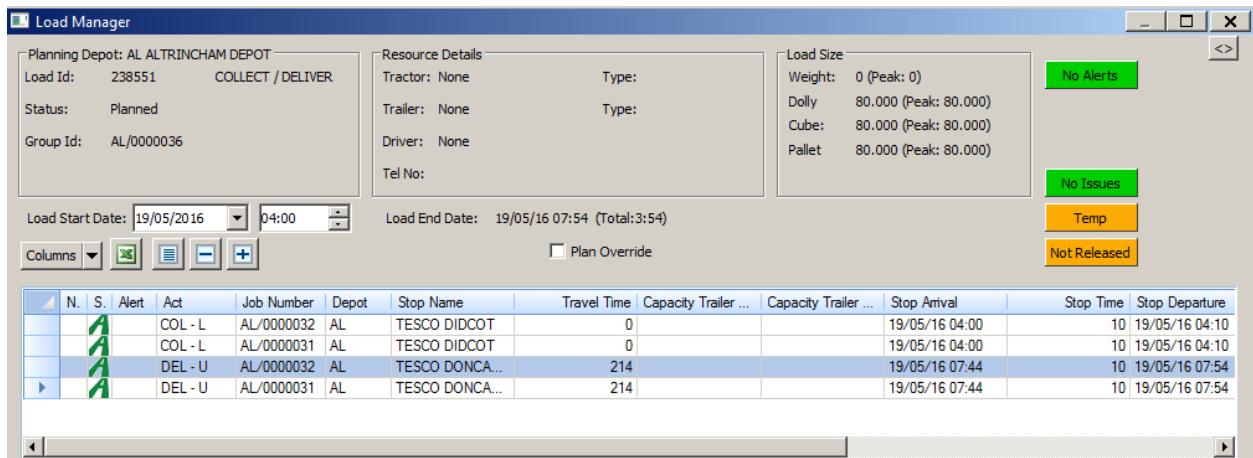


Figure 100

2. Right Click on the Legs and Click Route Via

The **Route Via Stop** window is displayed

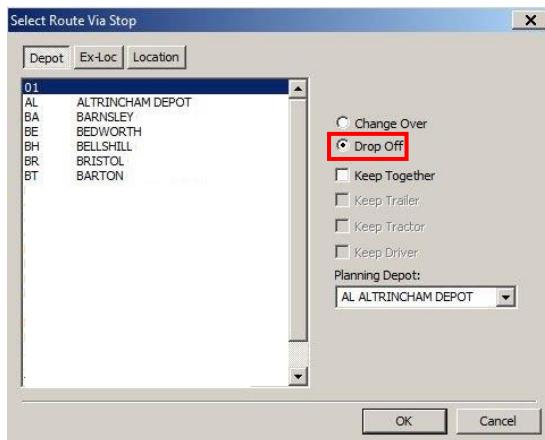


Figure 101

3. Select either the Depot, Ex-Loc or Location Tabs
4. Select the Location for the route via
5. Select Drop Off
6. Keep Together, Select to put the onward legs together in to a load
7. Planning Depot, Select the planning depot responsible for the onward load, Click OK

Original Load

Planning Depot: AL ALTRINCHAM DEPOT Load Id: 238551 COLLECT / DELIVER Status: Planned Group Id: AL/0000036	Resource Details Tractor: None Type: Trailer: None Type: Driver: None Tel No:	Load Size Weight: 0 (Peak: 0) Dolly: 80.000 (Peak: 80.000) Cube: 80.000 (Peak: 80.000) Pallet: 80.000 (Peak: 80.000)																																																																	
<input type="checkbox"/> Plan Override																																																																			
No Alerts No Issues Temp Not Released																																																																			
Load Start Date: 19/05/2016 <input type="button" value="04:00"/> <input type="button" value="Load End Date: 19/05/16 07:54 (Total:3:54)"/>																																																																			
Columns <input type="button" value="X"/> <input type="button" value="C"/> <input type="button" value="-"/> <input type="button" value="+"/>																																																																			
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4			DEL - U	AL/0000031	AL	TESCO DONCA...	214			19/05/16 07:44	10	19/05/16 07:54																																																							

Load After Route Via (Barnsley)

Planning Depot: AL ALTRINCHAM DEPOT Load Id: 238551 COLLECT / DELIVER Status: Planned Group Id: AL/0000036	Resource Details Tractor: None Type: Trailer: None Type: Driver: None Tel No:	Load Size Weight: 0 (Peak: 0) Dolly: 80.000 (Peak: 80.000) Cube: 80.000 (Peak: 80.000) Pallet: 80.000 (Peak: 80.000)																																																																	
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3			DEL - D	AL/0000032	AL	BARNESLEY	230			19/05/16 08:00	0	19/05/16 08:00																																																							
4			DEL - D	AL/0000031	AL	BARNESLEY	230			19/05/16 08:00	0	19/05/16 08:00																																																							

Create Route via from the Order Pool

From the Order Pool:

1. Select the Job(s) to be routed
2. Right click on the Job(s) and Select Route Via

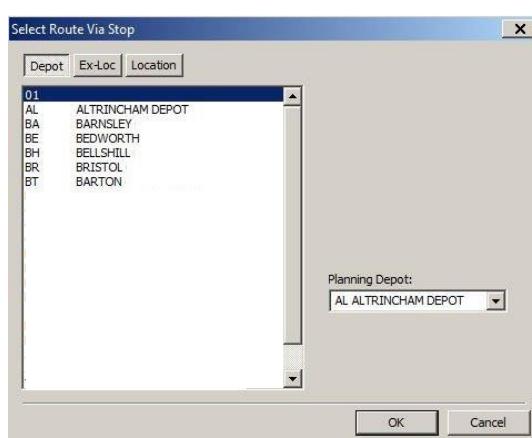
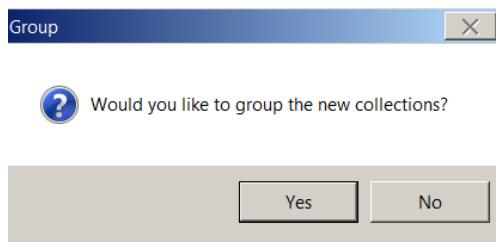


Figure 102

3. Select either the Depot, Ex-Loc or Location Tabs

4. Select the Location for the route via
5. Planning Depot, Select the planning depot responsible for the onward load
6. Click **OK**, if a single Job has been selected the collection leg will now be visible in the order pool
7. If more than one Job has been selected the Group new collections message can be displayed (ESP Admin setting can enables the message below, allowing collections to always be grouped or always dropped into the order pool)



- Click **Yes** to Group the Collection legs, this will create a Collection Load on the Traffic Sheet containing the collections
- Click **No** to leave the legs in the order pool at NP stage

Removing Route Via

From the Order Pool

1. Locate the Collection or Delivery Leg(s) in the Order Pool
2. Right Click on the Leg(s)
3. Click **Merge Delivery Leg**

From the Load Manager

1. Locate the Delivery Leg in the Load for the Collection
2. Right Click on the Leg, click **Remove Drop Off** (This option will only be available if the onward leg is at NP Status (Not Planned))
3. Click **OK**

The job will now be Collecting and Delivering on the load instead of dropping the onward leg off

From the Traffic Sheet

1. Locate the Collection load in the Traffic sheet (This is the load with the first part of the route)
2. Right Click on the Load
3. Click Delete Load

Both the Collection and Routed Loads will be removed from the Traffic Sheet and the jobs will be returned to the order pool in their original form. Alternatively the collection leg(s) can be removed from the load and the merge function can be used from the order pool.

Open Next/Previous Load

This function is used when a load has jobs with previous or next legs and is used to open up the corresponding load. This is useful when looking for other legs that have either been routed via another location or trunked.

From the Traffic Sheet or Order Pool:

1. Open the **Load Manager**
2. Right Click on the **Leg**
3. Click either **Open Next Load** or **Open Previous Load**

The Load that contains the onward or previous leg will be displayed

Transferring Jobs

Jobs can be transferred to other depots using the Transfer option from either the Order Pool or Traffic Sheet.

- Jobs can only be transferred from the Order Pool if they are at NP Stage.
- Jobs can only be transferred from the Traffic Sheet providing they have not been allocated Tractor Resource.

Transfer Jobs

1. Locate the Job to be transferred in either the Order Pool or Traffic Sheet
2. Right Click on the Job(Order Pool) or Load (Traffic Sheet)
3. From the Order Pool or Traffic Sheet, Select **Transfer to Depot**

The Transfer Load window will be displayed:



Figure 103

7. Click on the Depot that is going to receive the load
8. Click **OK**

Job in 01 Planning Depot before Transfer					Job in BA Depot after Transfer				
Order Pool 2 (Items: 2 Dolly; 80.000)					Order Pool 2 (Items: 1 Dolly; 30.000) Filter: All Orders				
Cur Type	Cur St...	Depot	A.	S.	Depot	A.	S.	Cur Stage	Cur Type
C&D	NP	AL	(S)		BA	(S)	NP	C&D	AL/0000032 ST

Undo Job Transfer

1. Locate the Job that has been transferred in either the Order Pool or Traffic Sheet
2. Right Click on the Job
3. Click Undo Job(s) Transfer
4. *The Revert Planning Responsibility back to Depot message is displayed:*

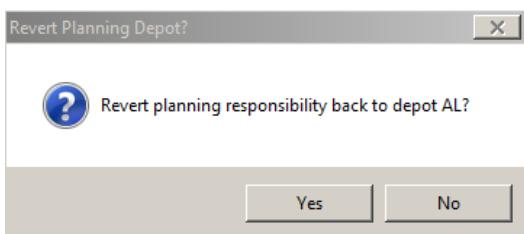


Figure 104

9. Click Yes

Trunks

Jobs can be trunked to other depots when the loads are initially created in ESP.

1. From the Order Pool,
2. Select the Job(s)
3. Right Click on the Job(s)
4. Select Create Load As
5. Select Trunk

The create new load dialog box is displayed (Figure 105)

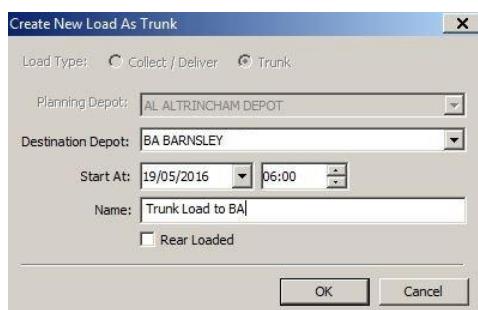
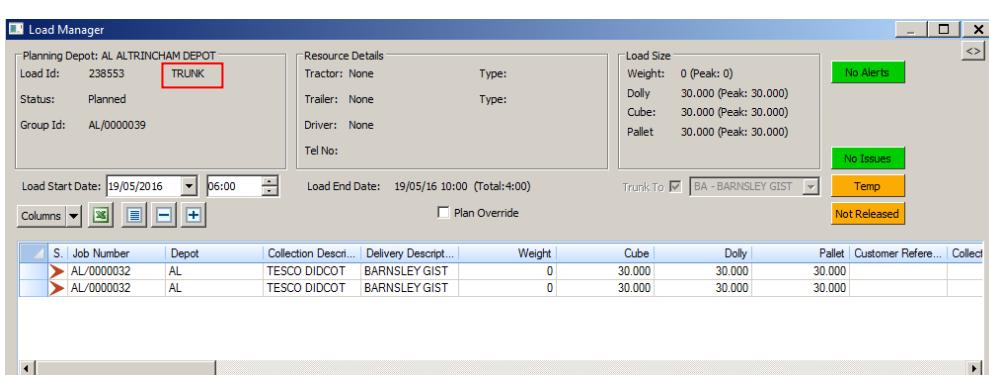


Figure 105

10. **Planning Depot**, ensure this is correct if not select the correct planning depot (This will only be accessible if logged in to more than one depot)
11. **Destination Depot**, Select the Destination depot for the trunk
12. **Start At**, Select the Start Date and Time for the Trunk
13. **Name**, Key in a name to identify the trunk (optional)
14. **Keep Together**, Select to keep the onward deliveries in a load (only visible if more than one job has been selected)
15. **Rear Loaded**, relevant for international movements onward ship/rail legs
16. Click **OK**, the load manager for the trunk will be displayed



The Load Manager window displays a summary of a load. On the left, under "Resource Details", it shows a "Load Id: 238553" with a red box around the word "TRUNK". Other details include "Status: Planned" and "Group Id: AL/0000039". In the center, "Load Size" details are listed: Weight: 0 (Peak: 0), Dolly: 30.000 (Peak: 30.000), Cube: 30.000 (Peak: 30.000), and Pallet: 30.000 (Peak: 30.000). To the right, there are green buttons for "No Alerts", "No Issues", and "Temp", and an orange button for "Not Released". At the bottom, a grid table shows two rows of delivery details:

S.	Job Number	Depot	Collection Descr...	Delivery Descr...	Weight	Cube	Dolly	Pallet	Customer Refere...	Collected
>	AL/0000032	AL	TESCO DIDCOT	BARNESLEY GIST	0	30.000	30.000	30.000		
>	AL/0000032	AL	TESCO DIDCOT	BARNESLEY GIST	0	30.000	30.000	30.000		

Figure 106

The Job will now be split into a Trunk leg in the Order Pool and a Delivery leg in the Order Pool of the receiving Depot.

Before the Trunk in the Originating Depot (Order Pool)

Order Pool 2 (Items: 1 Dolly: 30.000) Filter: All Orders											
All Orders											
Cur Type	Cur Stage	Depot	A. Sts	P.	Job Nu...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descri...	Pallet
C&D	NP	AL	(S)		AL/0000032	ST	SBCUST	TESCO DIDCOT	TESCO DONCA...	TESCO DONCASTER	30.000

After the Trunk in the Originating Depot (Traffic Sheet)

Traffic Sheet 12 (Items: 2 Dolly: 80.000) Filter: SBTS											
Triage View											
Depot	Load Status	Route					Load Id	Start Load	Finish Load	Load N...	
AL	PL	C TESCO DIDCOT 06:00>D BARNESLEY10:00					238552	19/05/16 06:00	19/05/16 10:00	Trunk Lo...	

After the Trunk in the Receiving Depots (Order Pool)

Order Pool 2 (Items: 2 Dolly: 60.000) Filter: All Orders											
All Orders											
Depot	A. Sts	Cur Stage	Cur Type	Job Number	Job Type	Customer Code	Collection	Delivery Descript...	FD Address Des...		
BA	◀ NP	DEL		AL/0000032	ST	SBCUST	BARNES	TESCO DONCA...	TESCO DONCA...		

GTS Job Details (Tracking Screen from Customer Enquiry)


 Leaders in Transport Management Software

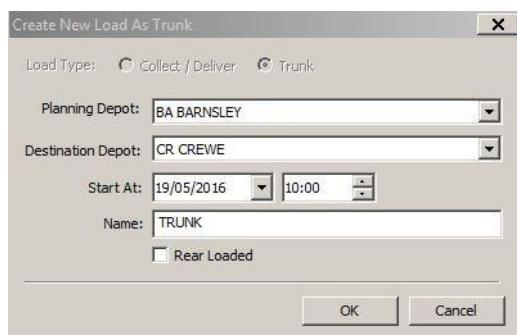
AL TRINCHAM DEPOT Summary Consignment Tracking

<div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Refresh </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Revenue & Costs </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> More </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Detail </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Job Audit </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> POD Entry/Update </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Consignment Summary </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Time & Distance </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;"> Enterprise Software </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Job Number AL/0000032 Collect: TESCO DIDCOT Customer SBCUST DIDCOT Cust. Ref. 19/05/16 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Job Raised 19/05/16 POD: Invoiced: </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 5%;">A</th> <th>Haulage Job</th> <th>From</th> <th>To</th> <th>Collection</th> <th>Delivery</th> </tr> </thead> <tbody> <tr> <td>I</td> <td>AL G 0000039</td> <td>TESCO DIDCOT</td> <td>BARNESLEY GIST</td> <td>19/05/16 06:10</td> <td>19/05/16 10:00</td> </tr> <tr> <td>P</td> <td>BA F 0000165</td> <td>BARNESLEY GIST</td> <td>TESCO DONCASTER</td> <td>19/05/16 23:27</td> <td>19/05/16 23:59</td> </tr> </tbody> </table>	A	Haulage Job	From	To	Collection	Delivery	I	AL G 0000039	TESCO DIDCOT	BARNESLEY GIST	19/05/16 06:10	19/05/16 10:00	P	BA F 0000165	BARNESLEY GIST	TESCO DONCASTER	19/05/16 23:27	19/05/16 23:59
A	Haulage Job	From	To	Collection	Delivery														
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P	BA F 0000165	BARNESLEY GIST	TESCO DONCASTER	19/05/16 23:27	19/05/16 23:59														

Trunking Delivery Leg

The Delivery Leg can then be trunked to another depot en-route if required; this will be displayed as a Mid Trunk in ESP:

1. Select the Delivery Leg from the Order Pool
2. Right Click the Delivery Leg
3. Click Create Load As
4. Click Trunk



17. **Planning Depot**, ensure this is correct if not select the correct planning depot (only available if logged in as more than one depot)
18. **Destination Depot**, Select the Destination depot for the trunk
19. **Start At**, Select the Start Date and Time for the Trunk
20. **Name**, Key in a name to identify the trunk (optional)
21. Click **OK**

The Leg will now be split into a further Trunk leg and Delivery leg in the Order Pool

Before the Trunk													
Order Pool 2 (Items: 2 Dolly: 60.000) Filter: All Orders													
	Cur Type	Cur Stage	Depot	A.	S	P.	Job Nu...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	C&D	PL	AL	➤			AL/0000032	ST	SBCUST	TESCO DIDCOT	BARNESLEY	TESCO DONCASTER	30.000
	DEL	NP	BA	◀			AL/0000032	ST	SBCUST	BARNESLEY	TESCO DONCA..	TESCO DONCASTER	30.000

After the Trunk has been created													
Order Pool 2 (Items: 3 Dolly: 90.000) Filter: All Orders													
	Cur Type	Cur Stage	Depot	A.	S	P.	Job Nu...	Job Type	Customer Code	Collection Description	Delivery Descript...	FD Address Descrip...	Pallet
	C&D	PL	AL	➤			AL/0000032	ST	SBCUST	TESCO DIDCOT	BARNESLEY	TESCO DONCASTER	30.000
	DEL	NP	CR	◀			AL/0000032	ST	SBCUST	CREWE	TESCO DONCA..	TESCO DONCASTER	30.000
	TRK	PL	BA	◊			AL/0000032	ST	SBCUST	BARNESLEY	CREWE	TESCO DONCASTER	30.000

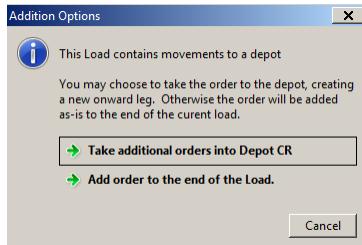
Note: The pink lines are displayed because the planner has access to AL depot only, the pink lines allow visibility of other legs created for other depots. The planner will not have access to create loads for these legs.

Adding Jobs to a Trunk Load

Once a trunk load has been created jobs can be added into the Trunk Load. When jobs are added ESP can either add the job as a collect/deliver en-route or it can be added to be trunked with the onward depot being responsible for the delivery.

From the Order Pool,

1. Drag and drop the job(s) onto the load on the Traffic sheet (or into an open Load Manager window)
2. Select one of the following two options:



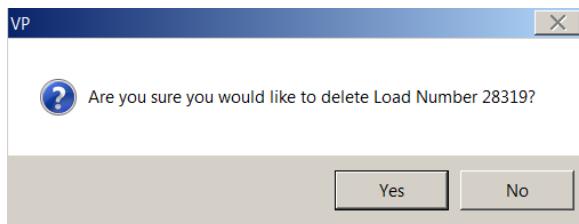
- Take additional orders into Depot – will Trunk the Order into the Depot
- Add order to the end of the Load - will Collect and Deliver the Job en-route

Deleting Trunks

Trunk Loads can be deleted if required. However once the load is at despatched status the options available for deletion change.

Deleting Trunk Legs (Before a load has been despatched)

1. Locate the Load that contains the Trunk Leg
2. Right Click the Leg
3. Select Delete Load



All legs that are part of the trunk movement will be removed and the job will appear in its original state in the order pool.

Deleting Trunk Legs (After a load has been despatched)

1. From the Load Manager
2. Click on the job/leg that needs to be removed from the trunk (if all jobs need deleting then all jobs can be selected)
3. Click **Remove**
4. Select from one of the options displayed (this message will be displayed if the onward legs are unplanned)

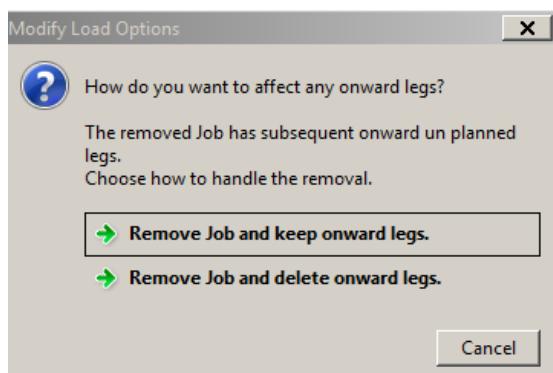


Figure 107

- Remove Jobs and delete onward legs – this will remove the jobs from the load and also delete the onward legs from the relevant planning depots
- Remove Jobs and keep onward legs – this will remove the jobs from the load but retain the onward legs in the relevant planning depots

Once Jobs have been returned to the Order Pool, there may be empty loads visible in the Traffic Sheet. These can be deleted if not required.

If the onward legs are planned the message will be different, providing details relating to the load ID and depot and providing the option to also cancel the remove with the ability to search for onward legs.

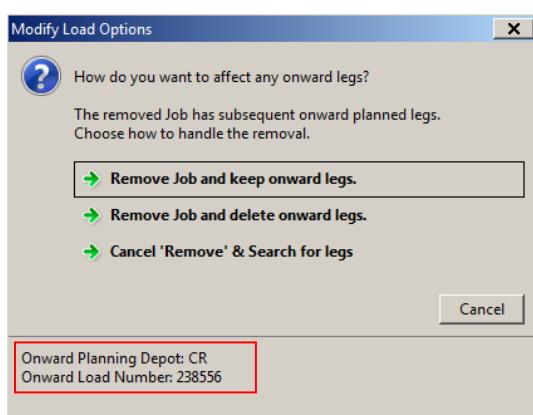


Figure 108

If the Cancel option is selected the search window will be displayed showing the legs of the job:

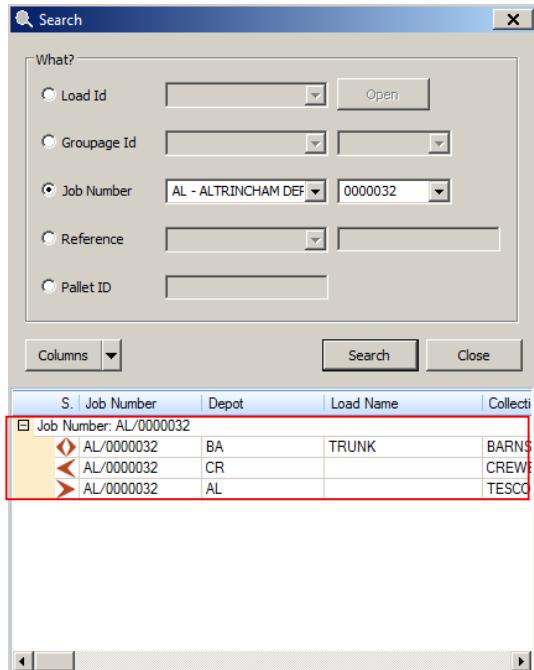


Figure 109

Remove Drop Off & Deliver on Trunk Route

When orders have been trunked across multiple depots the remove drop off function can be used. Remove drop off will remove the next sequenced drop in the route.

When orders are added to a trunk route they will automatically be trunked to the onward depot. When collection legs have been added to a single trunk route they can be re-routed to deliver on the trunk route instead.

About Remove Drop Off

The Loads below represent trunks to multiple depots:

Load 1	Load 2	Load 3	Load 4
Collect >Trunk Altrincham	Altrincham>Trunk Bolton	Bolton>Trunk Penrith	Penrith > Deliver
Job 1 Job 2 Job 3	Job 1 Job 2 Job 3	Job 1 Job 2 Job 3	Job 1 Job 2 Job 3

Remove drop off on Job 2 in Load 2 will result in the following routes:

Load 1	Load 2	Load 3	Load 4
Collect >Trunk Altrincham	Altrincham>Trunk Bolton	Bolton>Penrith	Penrith > Deliver
Job 1 Job 2 Job 3	Job 1 > Trunk Bolton Job 2 > Trunk Penrith Job 3 > Trunk Bolton	Job 1 > Trunk Penrith Job 3 > Trunk Penrith	Job 1 Job 2 Job 3

Remove Drop Off

1. From the Load Manager
2. Right Click on the relevant leg
3. Select Remove Drop Off

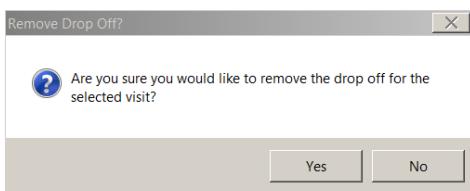


Figure 110

4. Click Yes

If the Job has another leg that is planned the following message will appear

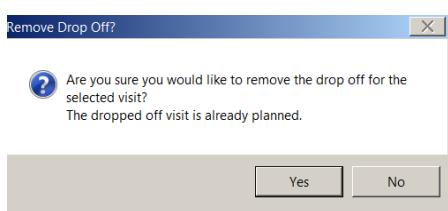


Figure 111

Deliver on Trunk Route

1. From the Load Manager
2. Right Click on the leg
3. Select Deliver on Trunk Route

In the example below the job has been planned on an Eccleshall trunk, when deliver on Trunk Route is selected the Job will deliver to Tesco in Doncaster.

Load Before Deliver on Trunk Route						Load After Deliver on Trunk Route																																																																																																																									
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Load Manager - TRUNK <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Planning Depot: BA BARNESLEY</td> <td style="width: 30%;">Resource Details</td> <td style="width: 40%;">Load Size</td> </tr> <tr> <td>Load Id: 238554</td> <td>Tractor: 0037</td> <td>Type: 38T</td> </tr> <tr> <td>Status: Resourced</td> <td>Driver: DEPALBA</td> <td>Weight: 0 (Peak: 0)</td> </tr> <tr> <td>Group Id: BA/0000166</td> <td>Trailer: BA02</td> <td>Dolly: 30,000 (Peak: 30,000)</td> </tr> <tr> <td>Tel No:</td> <td></td> <td>Cube: 30,000 (Peak: 30,000)</td> </tr> <tr> <td></td> <td></td> <td>Pallet: 30,000 (Peak: 30,000)</td> </tr> </table> </div> <div style="margin-bottom: 5px;"> Load Start Date: 19/05/2016 10:00 <input type="button" value="OK - CREWE GIST"/> <input checked="" type="checkbox"/> Trunk To <input type="checkbox"/> Plan Override <input type="checkbox"/> Not R </div> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>S</th> <th>Job Number</th> <th>Depot</th> <th>Collection</th> <th>Delivery Descr...</th> <th>Weight</th> <th>Cube</th> <th>Dolly</th> <th>Pallet</th> <th>Customer F...</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>AL/0000032</td> <td>BA</td> <td>BARNESLEY</td> <td>ECCLESHELL...</td> <td>0</td> <td>30,000</td> <td>30,000</td> <td>30,000</td> <td></td> </tr> <tr> <td>2</td> <td>AL/0000032</td> <td>BA</td> <td>BARNESLEY</td> <td>ECCLESHELL...</td> <td>0</td> <td>30,000</td> <td>30,000</td> <td>30,000</td> <td></td> </tr> <tr> <td>3</td> <td>Empty End Leg</td> <td>BA</td> <td></td> <td></td> <td>0</td> <td>0,000</td> <td>0,000</td> <td>0,000</td> <td></td> </tr> </tbody> </table> </div>						Planning Depot: BA BARNESLEY	Resource Details	Load Size	Load Id: 238554	Tractor: 0037	Type: 38T	Status: Resourced	Driver: DEPALBA	Weight: 0 (Peak: 0)	Group Id: BA/0000166	Trailer: BA02	Dolly: 30,000 (Peak: 30,000)	Tel No:		Cube: 30,000 (Peak: 30,000)			Pallet: 30,000 (Peak: 30,000)	S	Job Number	Depot	Collection	Delivery Descr...	Weight	Cube	Dolly	Pallet	Customer F...	1	AL/0000032	BA	BARNESLEY	ECCLESHELL...	0	30,000	30,000	30,000		2	AL/0000032	BA	BARNESLEY	ECCLESHELL...	0	30,000	30,000	30,000		3	Empty End Leg	BA			0	0,000	0,000	0,000		<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Load Manager - TRUNK <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Planning Depot: BA BARNESLEY</td> <td style="width: 30%;">Resource Details</td> <td style="width: 40%;">Load Size</td> </tr> <tr> <td>Load Id: 238554</td> <td>Tractor: 0037</td> <td>Type: 38T</td> </tr> <tr> <td>Status: Resourced</td> <td>Driver: DEPALBA</td> <td>Weight: 0 (Peak: 0)</td> </tr> <tr> <td>Group Id: BA/0000166</td> <td>Trailer: BA02</td> <td>Dolly: 30,000 (Peak: 30,000)</td> </tr> <tr> <td>Tel No:</td> <td></td> <td>Cube: 30,000 (Peak: 30,000)</td> </tr> <tr> <td></td> <td></td> <td>Pallet: 30,000 (Peak: 30,000)</td> </tr> </table> </div> <div style="margin-bottom: 5px;"> Load Start Date: 19/05/2016 10:00 <input type="button" value="OK - CREWE GIST"/> <input checked="" type="checkbox"/> Trunk To <input type="checkbox"/> Plan Override <input type="checkbox"/> Not R </div> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>S</th> <th>Job Number</th> <th>Depot</th> <th>Collection</th> <th>Delivery Descr...</th> <th>Weight</th> <th>Cube</th> <th>Dolly</th> <th>Pallet</th> <th>Customer F...</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>AL/0000032</td> <td>BA</td> <td>BARNESLEY</td> <td>TESCO DONCA...</td> <td>0</td> <td>30,000</td> <td>30,000</td> <td>30,000</td> <td></td> </tr> <tr> <td>2</td> <td>AL/0000032</td> <td>BA</td> <td>BARNESLEY</td> <td>TESCO DONCA...</td> <td>0</td> <td>30,000</td> <td>30,000</td> <td>30,000</td> <td></td> </tr> <tr> <td>3</td> <td>Empty End Leg</td> <td>BA</td> <td></td> <td></td> <td>0</td> <td>0,000</td> <td>0,000</td> <td>0,000</td> <td></td> </tr> </tbody> </table> </div>						Planning Depot: BA BARNESLEY	Resource Details	Load Size	Load Id: 238554	Tractor: 0037	Type: 38T	Status: Resourced	Driver: DEPALBA	Weight: 0 (Peak: 0)	Group Id: BA/0000166	Trailer: BA02	Dolly: 30,000 (Peak: 30,000)	Tel No:		Cube: 30,000 (Peak: 30,000)			Pallet: 30,000 (Peak: 30,000)	S	Job Number	Depot	Collection	Delivery Descr...	Weight	Cube	Dolly	Pallet	Customer F...	1	AL/0000032	BA	BARNESLEY	TESCO DONCA...	0	30,000	30,000	30,000		2	AL/0000032	BA	BARNESLEY	TESCO DONCA...	0	30,000	30,000	30,000		3	Empty End Leg	BA			0	0,000	0,000	0,000	
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3	Empty End Leg	BA			0	0,000	0,000	0,000																																																																																																																							

Inbound Order Pool

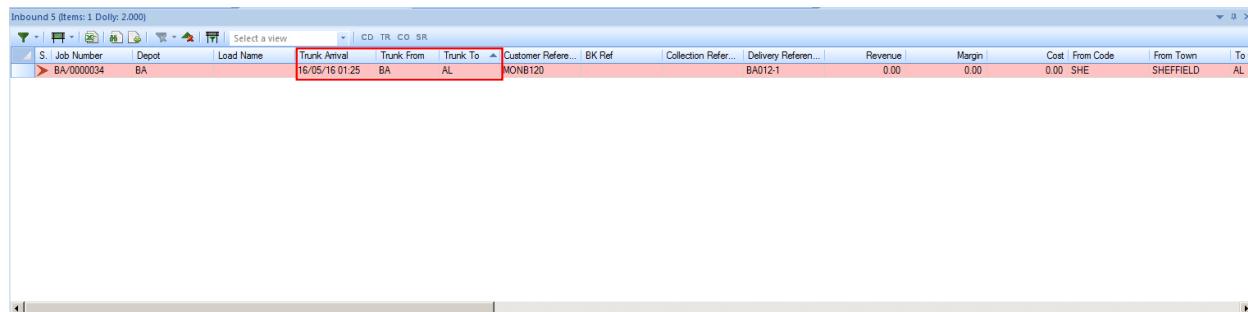
The Inbound order Pool allows the planner to View Trunk Movements that are destined for their depot. The Trunk To and Trunk from Columns together with the Arrival time of the leg provides details relating to the arrival of the Trunk into the depot.

Note: The Inbound Order Pool is for viewing Loads only, Loads cannot be dragged and dropped into the Inbound Order Pool.

- The columns available in the *Inbound Order Pool* are similar to those in the *Traffic Sheet*. Three additional columns are also available:

Column	Definition
Trunk From	The Location the Trunk is being Sent From
Trunk To	The Location the Trunk is going To
Trunk Arrival	The date <u>and</u> time that the <i>Trunk</i> load is expected to arrive at the <i>Trunk To</i> depot.

Inbound Order Pool

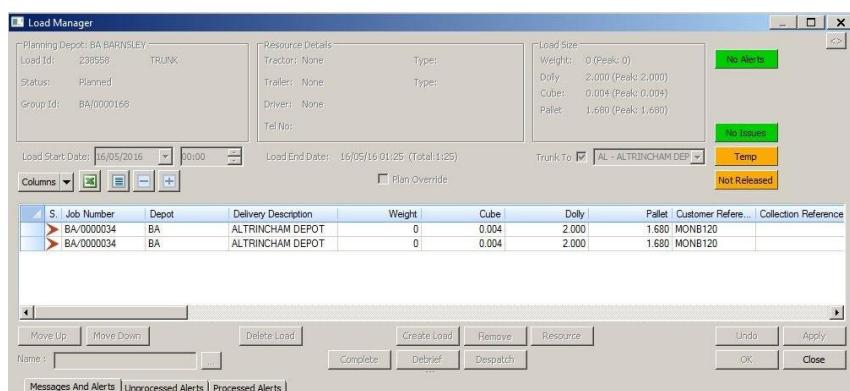


S. Job Number	Depot	Load Name	Trunk Arrival	Trunk From	Trunk To	Customer Reference	BK Ref	Collection Reference	Delivery Reference	Revenue	Margin	Cost	From Code	From Town	To C
BA/0000034	BA		16/05/16 01:25	BA	AL	MONB120	BA012-1			0.00	0.00	0.00	SHE	SHEFFIELD	AL

Access Load Manager from the Inbound Order Pool

Details in the Load Manager can also be viewed for any leg displayed in the Inbound Order Pool.

- From the Inbound Order Pool
- Right Click on the Job
- Select Open Load Manager



S. Job Number	Depot	Delivery Description	Weight	Cube	Dolly	Pallet	Customer Reference	Collection Reference
BA/0000034	BA	ALTRINCHAM DEPOT	0	0.004	2.000	1,680	MONB120	
BA/0000034	BA	ALTRINCHAM DEPOT	0	0.004	2.000	1,680	MONB120	

Figure 112

Visits

The route of a load can be changed to include visits. Visits can be used to change the start and end locations of the route (start and end leg points) Visits can also be used to represent additional blocks of time (nights out) that the driver is completing en-route.

Visit names and durations are setup in ESP Admin, once these have been setup they will be available from the visit function in ESP.

Visits can be added to loads from either the Traffic Sheet, Gantt Chart or Load Manager. Also, the Position of the visit in the route can be amended by moving the visit up or down within Load Manager.

Adding a Visit to a load

From the Traffic Sheet:

1. Right Click on the Load and select either **Add Visit at Start** or **Add Visit at End**

Alternatively, from the Gantt chart:

2. Right click on the relevant block and select either Add Visit at Start or Add Visit at End

Or, from the Load Manager:

3. Right click on the leg of the route that requires the visit and Click Add Visit

The Add Visit window is displayed:

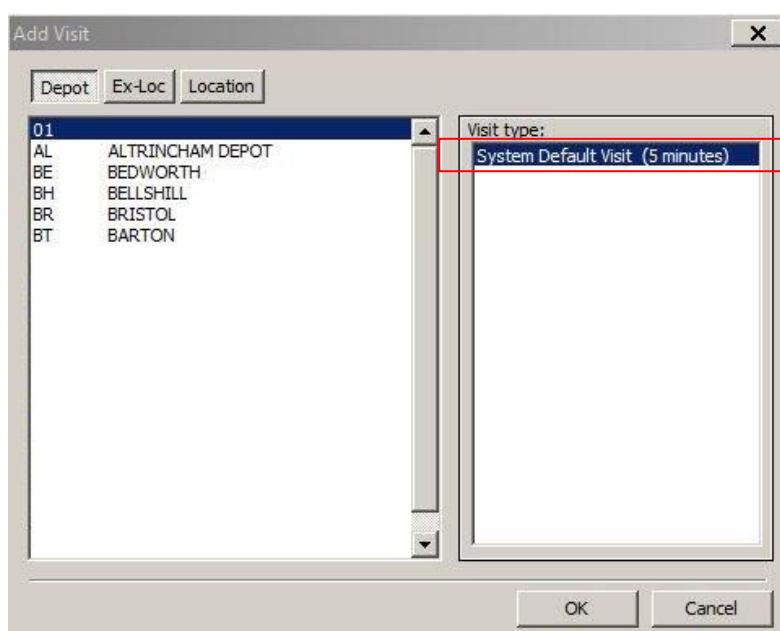


Figure 113

22. Click the Visit Type for example Pick Up Paperwork (the durations displayed will be added to the route)
23. Select the Depot, Ex-Loc or Location for the Visit (Click on the relevant tabs and select the location from the list)
24. Click OK

The Visit will now be displayed in the Load Manager

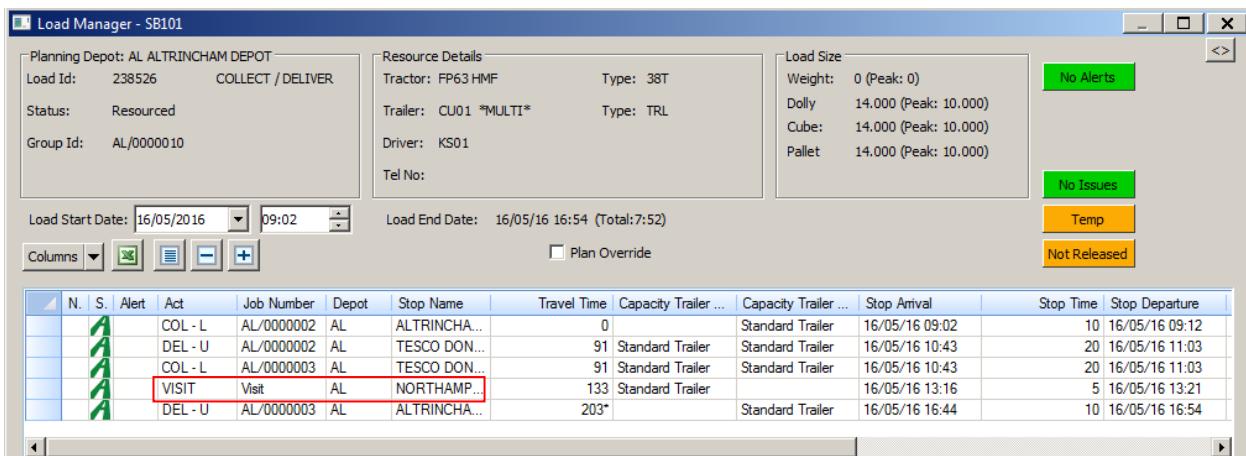


Figure 114

The Position of the visit can be changed if required:

25. Click on the Visit in Load Manager
26. Click on the Move up or Move Down buttons

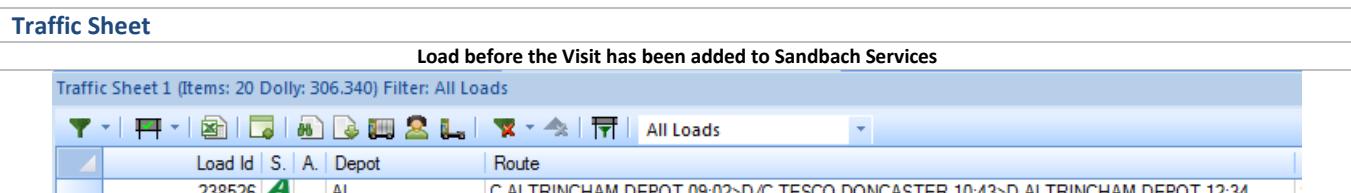


Figure 115

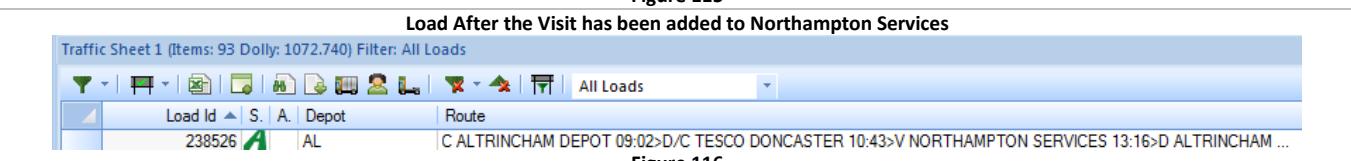


Figure 116

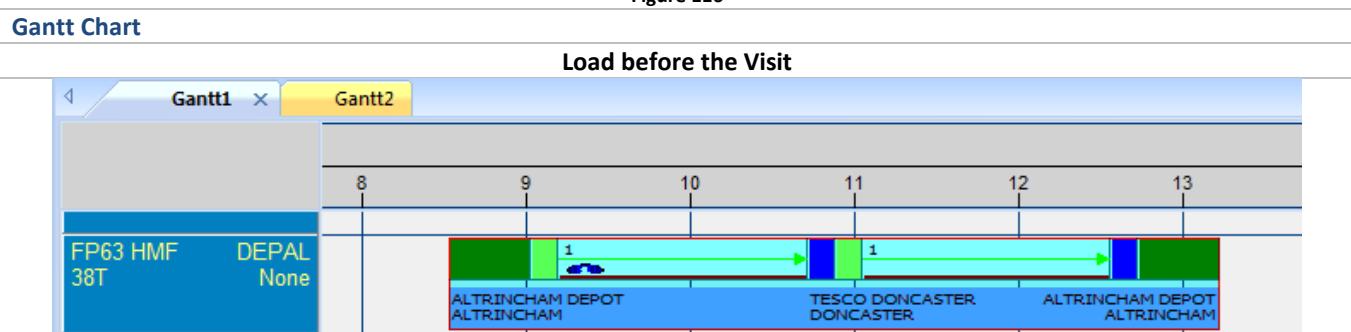


Figure 117

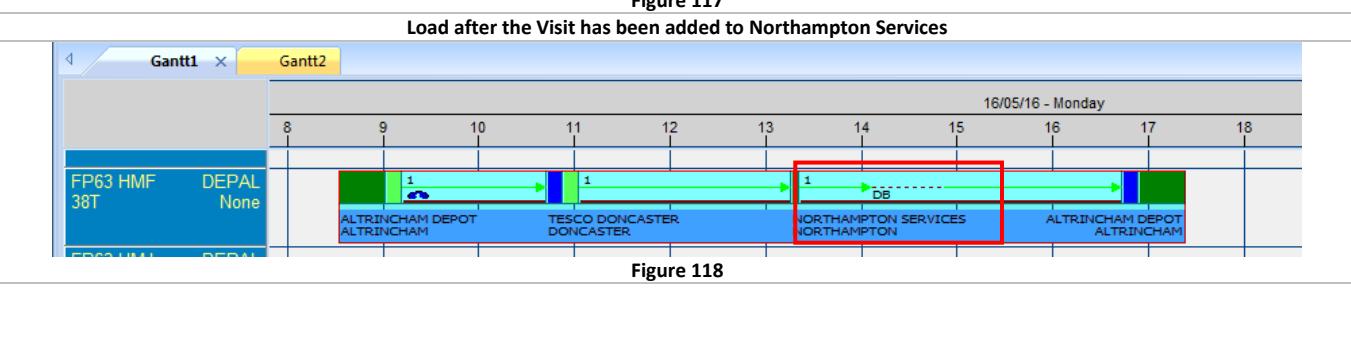


Figure 118

Removing a Visit from a load

From the Load Manager:

1. Right Click on the Visit in the Load
2. Click Remove Visit
3. Click **Apply**

Night Out

Nights Out durations are setup in the GTS Nights Out Master file and can be inserted into a load from within the load manager.

Add Night Out

1. From Load Manager
2. Right Click on the leg
3. Click Add/Edit Night Out

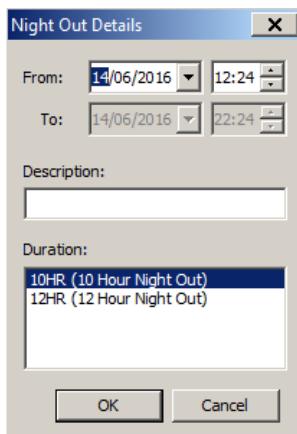
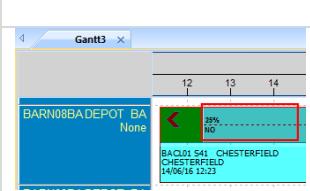


Figure 119

27. Duration, Select the night out duration
28. Description, Key in a description for the night out (this is for reporting only and is not visible in ESP)
29. Click OK

The Night Out will now be visible in the Load Manager, Traffic Sheet and Gantt Chart

Load Manager	Traffic Sheet	Gantt Chart																																																	
<table border="1"> <thead> <tr> <th>N.</th> <th>Job...</th> <th>Job Number</th> <th>A.</th> <th>S.</th> <th>Depot</th> <th>Stop Name</th> <th>Stop Arrival</th> </tr> </thead> <tbody> <tr> <td>01</td> <td></td> <td>BA/0002143</td> <td></td> <td></td> <td>BA</td> <td>BACL01 S41 C...</td> <td>14/06/16 12:23</td> </tr> <tr> <td>01</td> <td></td> <td>BA/0002149</td> <td></td> <td></td> <td>BA</td> <td>BACL01 S41 C...</td> <td>14/06/16 12:23</td> </tr> <tr> <td>01</td> <td></td> <td>BA/0002149</td> <td></td> <td></td> <td>BA</td> <td>Belshill Depot</td> <td>15/06/16 04:38</td> </tr> <tr> <td>01</td> <td></td> <td>BA/0002143</td> <td></td> <td></td> <td>BA</td> <td>Bamsley Depot</td> <td>15/06/16 06:28</td> </tr> </tbody> </table>	N.	Job...	Job Number	A.	S.	Depot	Stop Name	Stop Arrival	01		BA/0002143			BA	BACL01 S41 C...	14/06/16 12:23	01		BA/0002149			BA	BACL01 S41 C...	14/06/16 12:23	01		BA/0002149			BA	Belshill Depot	15/06/16 04:38	01		BA/0002143			BA	Bamsley Depot	15/06/16 06:28	<p>Traffic Sheet 2 (Items: 3 Dolly: 61.000) Filter: sb</p> <table border="1"> <thead> <tr> <th>Job Number</th> <th>Load Id</th> <th>Route</th> </tr> </thead> <tbody> <tr> <td>BA/0002143 ... BA...</td> <td>239663</td> <td>C BACL01 S41 CHESTERFIELD 12:23 NO 22:23>D B...</td> </tr> <tr> <td>BA/0002149 ... BA...</td> <td>239676</td> <td>C Bamsley Depot 04:29>D BADL05 NG31 GRANTHAM...</td> </tr> </tbody> </table>	Job Number	Load Id	Route	BA/0002143 ... BA...	239663	C BACL01 S41 CHESTERFIELD 12:23 NO 22:23>D B...	BA/0002149 ... BA...	239676	C Bamsley Depot 04:29>D BADL05 NG31 GRANTHAM...	<p>Gantt3</p> 
N.	Job...	Job Number	A.	S.	Depot	Stop Name	Stop Arrival																																												
01		BA/0002143			BA	BACL01 S41 C...	14/06/16 12:23																																												
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BA/0002149 ... BA...	239676	C Bamsley Depot 04:29>D BADL05 NG31 GRANTHAM...																																																	

Remove the Night Out

1. From the Load Manager
2. Right Click on the let with the night out
3. Select Remove Night Out
4. Click **Apply**

Re-Routing Loads (Route Via/Route Via Changeover)

The route on a load may need changing if the load is planned as a collect/deliver and the driver is now going to bring the load back into a depot instead of delivering it directly. Loads are re-routed from the Load Manager, jobs within a load can also be routed as a changeover.

1. From Load Manager
2. Right Click on the delivery leg (If multiple legs need to be re-routed, select the legs using Ctrl+Click)
3. Select **Route Via...**

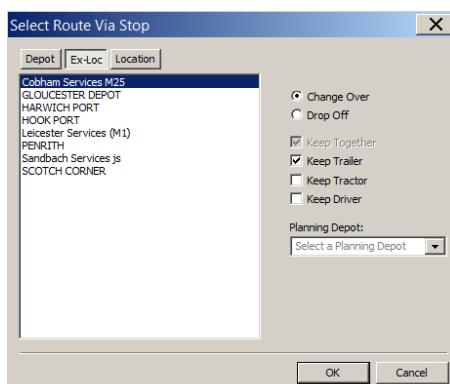
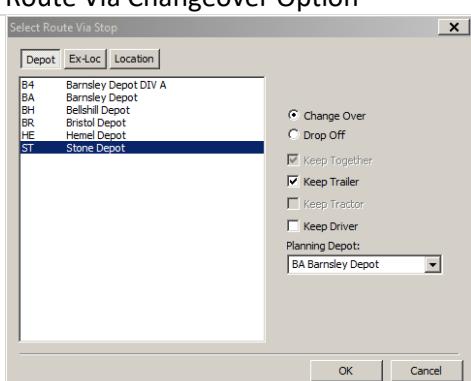
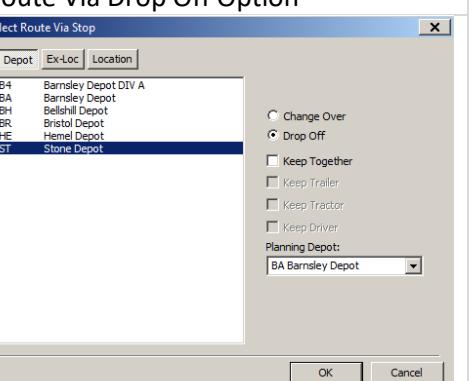


Figure 120

4. Select either Change Over or Drop Off,

Route Via Changeover Option	Route Via Drop Off Option
 <p>Selecting the Changeover option will create a changeover load for the job allowing the Trailer, or Driver to be retained for the onward load.</p>	 <p>Selecting the Drop Off Option allows the keep together option to be selected (if more than one job is selected the onward delivery legs will be kept together in a load)</p>

- For Changeovers, Select to Keep the Trailer or Driver
- For Route Via, Select the Keep together option (if required)

5. Select the location for the Route Via or Changeover (Click on the relevant tab, Depot, Ex-loc or Location)

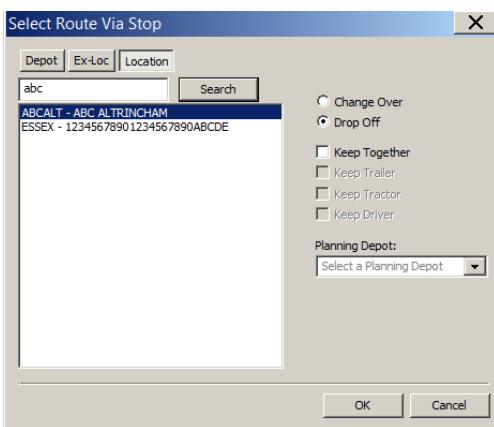


Figure 121

6. **Planning Depot**, Select the planning depot for the Route via
7. Click **OK**
8. Note: The Keep together function will only be available if there is more than one job on the load.
Selecting this function will result in the onward legs being put together into a load (kept together)

The Load will now be re-routed in the Traffic Sheet, with a drop off the delivery leg will now be visible in the order pool ready to be added to a load. For a changeover the changeover load will be visible on the Traffic Sheet

Traffic Sheet - Original Load before route via

Traffic Sheet 1 (Items: 97 Dolly: 1090.740) Filter: All Loads			
Load Id	S.	A.	Depot
238562	A	AL	C TESCO DIDCOT 00:00>D BARNESLEY ...

Figure 122

Traffic Sheet – Re-routed Load to the Crewe Depot

Traffic Sheet 1 (Items: 97 Dolly: 1090.740) Filter: All Loads			
Load Id	S.	A.	Depot
238562	A	AL	C TESCO DIDCOT 00:00>D CREWE 03:14>D BARNESLEY ...

Figure 123

Order Pool – Leg from Crewe Depot to Barnsley Depot

Order Pool 2 (Items: 492 Dolly: 7808.841) Filter: All Orders										
Cur Type	Cur Stage	Depot	A.	Sts	P.	Job Num...	Job Type	Customer Code	Collection D...	Delivery De...
C&D	NP	AL				AL/0000044	ST	SBCUST	CREWE	BARNESLEY ...

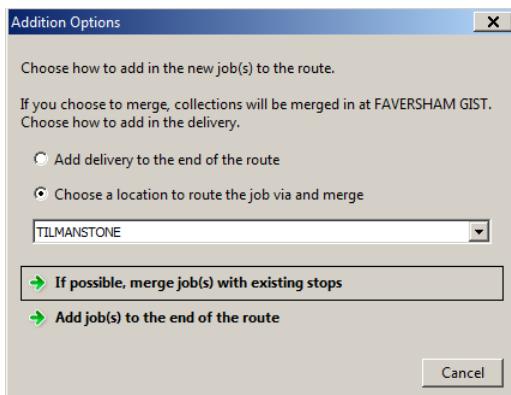
Figure 124

Load with a Changeover at Stone Depot

Traffic Sheet 2 (Items: 2 Dolly: 38.080) Filter: All Loads									
S.	Load Id	T	D	Route					
	239848	sb	B..	S BRDL25 GL1 GLOUCESTER 00:00>MT 224>C ABC CHESTER 03:14>D Stone Depot 05:54>MT 14...					
	239849	sb	B.	C Stone Depot 06:54>D ABC LIVERPOOL 08:28					

Route Via - Additional Options

When jobs are dragged into loads, Route Via's can be created automatically. If the Delivery location of the Job doesn't match the Stops on the load then the Route via additional options window is displayed.



- The Delivery can be merged with existing stops on the load (ESP will only be able to do this if the dates and times are feasible) and a route via location can be chosen
- Alternatively, the job can be added to the end of the load

Add Customer Service Issue

Details of Customer Service Issues can be added to a load in the Traffic Sheet. Details entered are sent back to GTS and recorded as a Manual Non-Conformance against the Job. Non Conformance Reasons and Codes need to be setup in the relevant GTS Master File. The Customer Master file must also have the Non-Conformance flag set for Customer Service Issues/Non-Conformance to be recorded.

From the Order Pool

1. Right Click on the Job
2. Click Add Customer Service Issue

Alternatively, From the Traffic Sheet/Supplier Bin

3. Right Click on the Load
4. Click Add Customer Service Issue

Or, From the Load Manager

5. Select the Job(s)
6. Right Click on the Job(s)
7. Click Add Customer Service Issue
8. The Raise Customer Service Issue window is displayed:

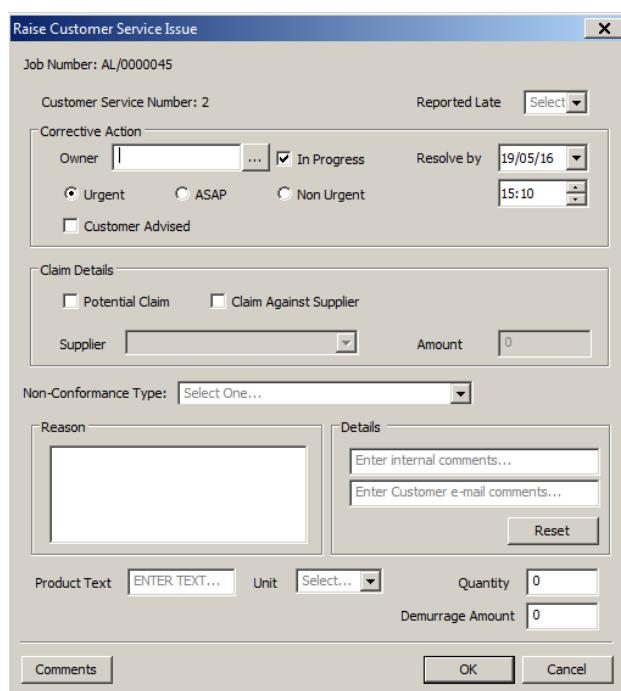


Figure 125

Complete the Following fields:

9. **Reported Late**, Select either Yes or No



10. **Owner**, Click  and select the Owner (username) of the Issue

11. **In Progress**, Select if the Issue is in Progress

12. **Resolve By**, Select the Resolve by Date/Time

13. **Urgent,ASAP,Non-Urgent**, Select one of these options to identify the priority of the Issue

14. **Potential Claim**, Select if there has been a potential claim raised by the customer for the issue

15. **Claim Against Supplier**, Select if there is going to be a claim raised against the Supplier (enables the Supplier and Amounts Fields)

16. **Supplier**, Select the Supplier from the Drop down list

17. **Amount**, Key in the Amount for the Claim

18. **Non Conformance Type**, Select the Type of Issue from the Drop Down List

19. **Reason**, Click on the Relevant Reason Code (This field will be populated once a Type has been selected)

20. **Details**, Key in any internal comments or comments for the email to customer

21. **Product Text**, Key in the details relating the product

22. **Unit**, Select the Unit relating to the Product

23. **Qty**, Select the Unit relating to the Product

24. **Demurrage Amount**, Key in any demurrage

25. **Customer Advised**, Select to identify that the Customer has been advised of the Issue

26. **Comments**, Click  to expand out the comments section of the window, Key in any comments if required

27. Click **OK**

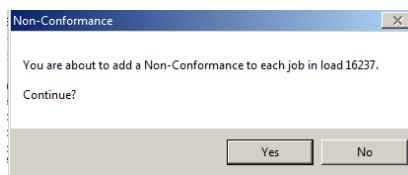


Figure 126

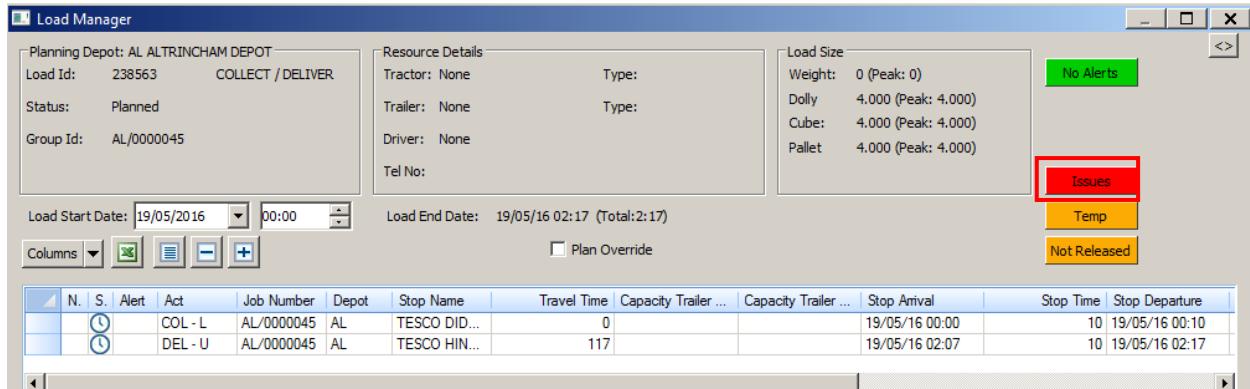
28. Click **Yes** to confirm the non conformance

The NC field in the Traffic Sheet/Order Pool will be updated to indicate a non-conformance has been recorded :

Order Pool 2 (Items: 491 Dolly: 7804.841) Filter: All Orders												
	Cur Type	NC	Cur Stage	Depot	A.	Sts	P.	Job Num...	Job Type	Customer Code	Collection D...	Delivery De...
C&D		X	PL	AL				AL/0000045	ST	SBCUST	TESCO DID...	TESCO HIN...

Figure 127

In the Load Manager, the Issues Button will also be visible :

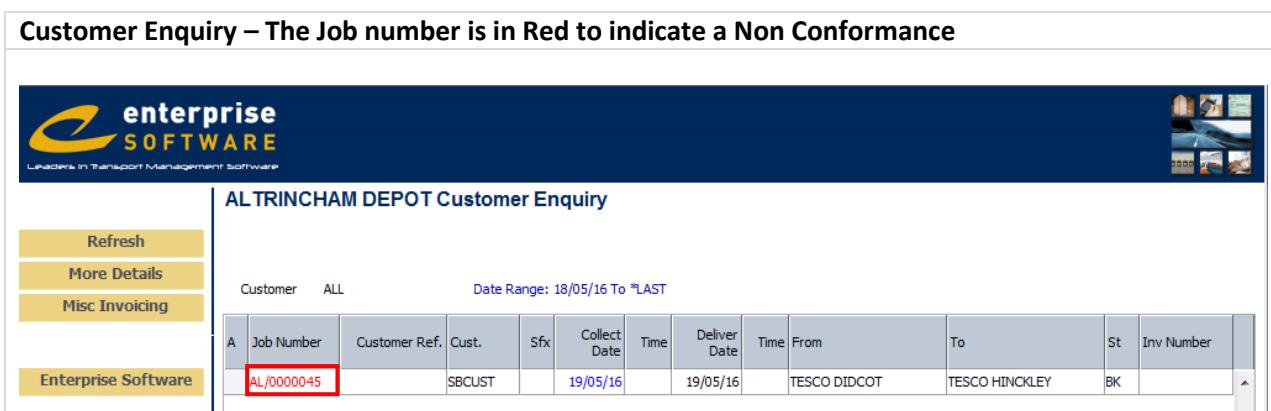


The Load Manager interface shows planning details for Load Id: 238563, Status: Planned, Group Id: AL/0000045. Resource Details include Tractor: None, Trailer: None, Driver: None. Load Size shows Weight: 0 (Peak: 0), Dolly: 4.000 (Peak: 4.000), Cube: 4.000 (Peak: 4.000), Pallet: 4.000 (Peak: 4.000). A table lists stops: COL-L at TESCO DIDCOT and DEL-U at TESCO HINCKLEY. The 'Issues' button is highlighted with a red box.

Figure 128

In GTS the Non-conformance will also have been recorded against the job:

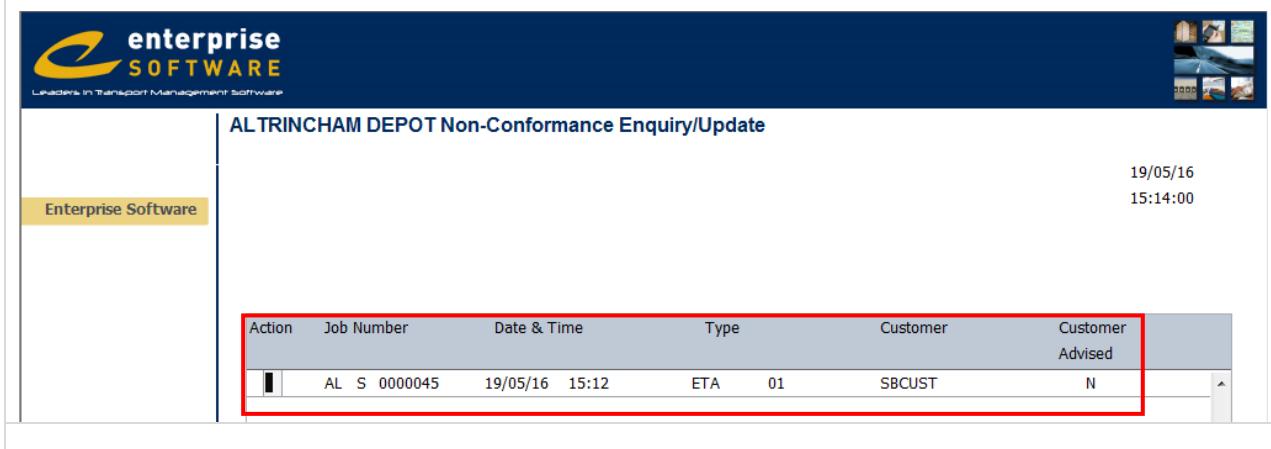
Customer Enquiry – The Job number is in Red to indicate a Non Conformance



The Customer Enquiry screen shows stops for ALTRINCHAM DEPOT. The table includes columns: A, Job Number, Customer Ref., Cust., Sfx, Collect Date, Time, Deliver Date, Time, From, To, St, Inv Number. The row for stop AL/0000045 is highlighted with a red box.

Figure 129

Non Conformance Details are recorded against the job



The Non-Conformance Enquiry/Update screen shows details for ALTRINCHAM DEPOT. The table includes columns: Action, Job Number, Date & Time, Type, Customer, Customer Advised. The first row (Action: S, Job Number: AL S 0000045, Date & Time: 19/05/16 15:12, Type: ETA, Customer: SBCUST, Customer Advised: N) is highlighted with a red box.

To View the Non Conformance in ESP

1. Right Click on the order in the order pool, Select Non Conformance from the menu
2. Key in your GTS user name and password and Click OK
3. GTS Non Conformances will be displayed

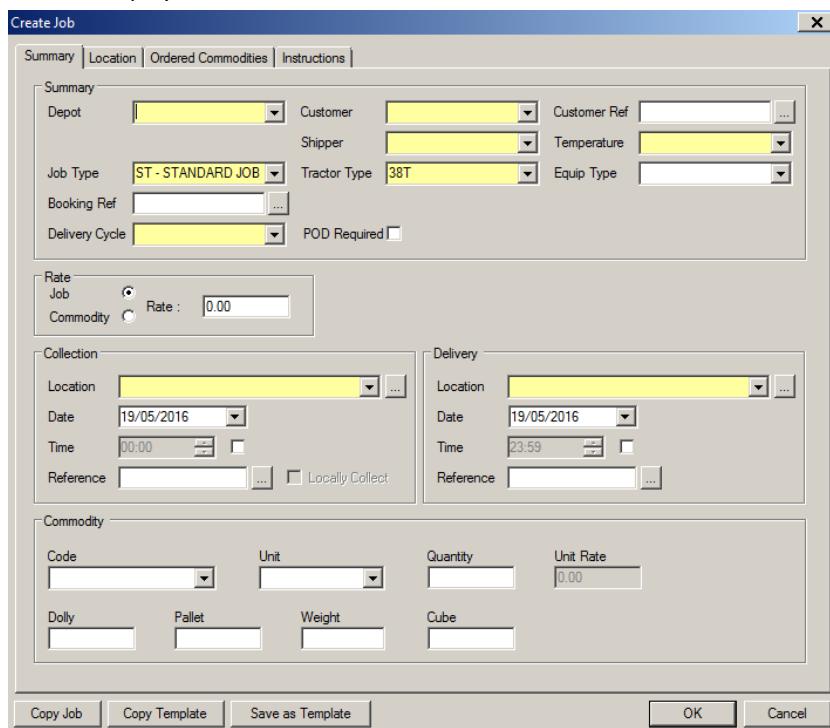
Creating New Jobs

Jobs can be created and Copied in ESP using the New Job function.

From the Tool bar:

1. Click  (Create Job)

The Fast Path Job Entry Screen is displayed:



The screenshot shows the 'Create Job' dialog box with several tabs at the top: Summary, Location, Ordered Commodities, and Instructions. The 'Summary' tab is active, displaying fields for Depot, Customer, Customer Ref, Shipper, Temperature, Job Type (set to 'ST - STANDARD JOB'), Tractor Type (set to '38T'), Equip Type, Booking Ref, Delivery Cycle, and a checkbox for 'POD Required'. Below this is a 'Rate' section with a radio button for 'Job' selected, showing a Rate of '0.00'. The 'Collection' section includes fields for Location, Date (19/05/2016), Time (00:00), and Reference. The 'Delivery' section includes fields for Location, Date (19/05/2016), Time (23:59), and Reference. The 'Commodity' section contains fields for Code, Unit, Quantity (0.00), and Unit Rate, along with dropdowns for Dolly, Pallet, Weight, and Cube. At the bottom are buttons for Copy Job, Copy Template, Save as Template, OK, and Cancel.

Figure 130

Most Mandatory fields are highlighted in Yellow – However the **Quantity** and **Commodity** Field **MUST** be completed to ensure the order is created in GTS. Other fields such as Equip Type, Reference fields, , Job Rate are not mandatory. Note: The Shipper, Delivery Cycle field and Temperature fields are only visible if ESP chilled is switched on.

2. Key in the following information to create a job:

Depot

Key in the Depot Code or select from the drop down list

Customer

Key in the Customer Code or Click the drop down arrow to select from the list

Customer Ref

Key in the Customer reference (Mandatory for some Customers)

Job Type

This Defaults to 01 but can be changed if required (Click the drop down arrow to select from the list)

Tractor Type

Key in the Tractor type or select from the drop down list

POD Required

Select the tick box to indicate that a POD is required to be recorded before the job can be invoiced in GTS

Rate

Select either job (Flat rate for the job) or commodity (Unit Level Rate) then key in the rate in the Rate field

Collection Location

Key in the Collection Location or Click the drop down arrow to select from the list (Click the search button ... to search for a location)

Collection Date/Time

Key in the Collection Date/Time or select from the Drop Down list (Click the Time tick box to enter a fixed collection or delivery time)

Locally Collect Tick box

Select (tick) if this order is to be collected locally – this will create a separate leg for the collection and one for the delivery

Delivery Location

Key in the Delivery Location or Click the drop down arrow to select from the list (Click the search button ... to search for a location)

Deliver Date/Time

Key in the Delivery Date or select from the Drop Down list, Click the Tick box to enter a Time list (Click the Time tick box to enter a fixed collection or delivery time)

Commodity Code

Key in the Commodity or Click the drop down arrow to select from the list

Unit

Ensure the Unit is Correct if not key or select from the drop down list

Quantity

Key in the Quantity for the Jobs

Pallet/Cases/Weight/Cube

Key in the Equivalent Pallet/Case/Weight/Cube

Note: if Special instructions are required go to the next step before Clicking on OK to confirm the job

3. Click **OK** to Create the Job

Add Special Instructions (before confirming the job)

4. Click the Instructions tab at the top of the screen
5. Click the Add button to add an instruction
6. Key in the Instruction text
7. Print Code Should be Road Note (Print on Road Note) This instruction can appear on the Drivers Report/Trip Sheet if required and specified.
8. Click on any of the other Tabs to check and amend details (Location, Commodities or Special Requirements)
9. Click **OK**

Add Special Requirements (before confirming the job)

10. Click the Requirements tab at the top of the screen
11. Click the Add button to add the requirement
12. Select the Location that the requirement relates to (Both, collection or delivery)
13. Select the Resource the Requirement relates to (Tractor, Driver or Trailer)
14. Code, Select the requirement code (e.g livery or tail lift)
15. Click to Accept Alert (this will allow the user to accept the alert, leave deselected to make the alert a major alert that has to be resolved by applying the correct resource)
16. Click OK

Copy Jobs

Once jobs have been created the details can be Copied across to create a new job in ESP.

Login to the Relevant Depot in ESP

From the Toolbar:

1. Click  (Create Job button)

The ESP Create Job Screen will now be displayed:

2. Click the Copy Job button

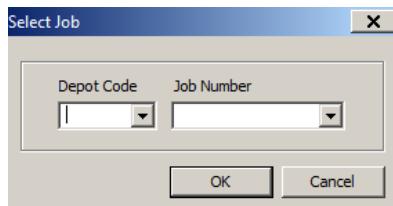


Figure 131

3. Depot Code, Select the Depot Code from the Drop Down List
4. Job Number, Key in the Number of the Job that is to be copied
5. Click OK
6. The Job Details will be displayed on the Create Job Screen, amend any details as required
7. Click OK to Create the Job

Save as Template

Once a Job has been created in ESP the details of the job can be saved as a template.

1. From the Create Job Screen
2. Check the details are correct on the screen and change any details as necessary
3. Click the **Save as Template** button

Use a Template

Once a job has been saved as a template the details can be used for new jobs.

From the Menu, Access the Create Job screen:

1. Click  (Create Job)
2. Click the **Copy Template** button

The select Template window is displayed:

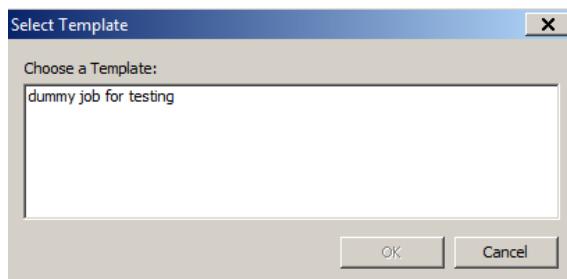


Figure 132

3. Click on the template name from the list
4. Click OK

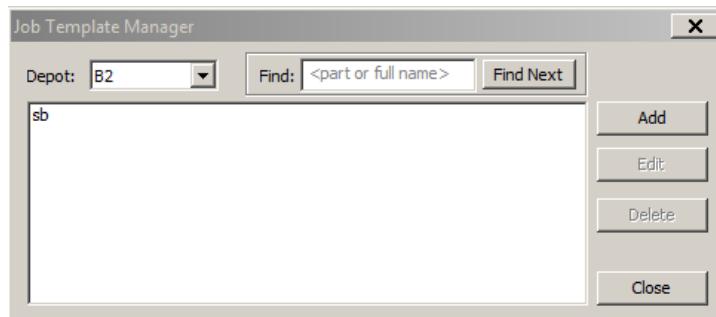
Details from the template will be copied across to the new job.

Editing and Deleting Job Templates using the Template Manager

The Job Template Manager can be used to Add, Edit or Delete templates.

From the Menu:

1. Click Tools, Manage Job Templates
2. Select the Depot from the Depot drop down list



To Delete a template:

1. Click on the template name and click **Delete**

To Edit a template

2. Click on the Template name and click **Edit**

To Add a Template from the Template Manager

1. Click **Add**
2. Key in the Details on the Create Job Screen (see previous Section)
3. Click **OK**
4. Key in the Template Name and Click **OK**

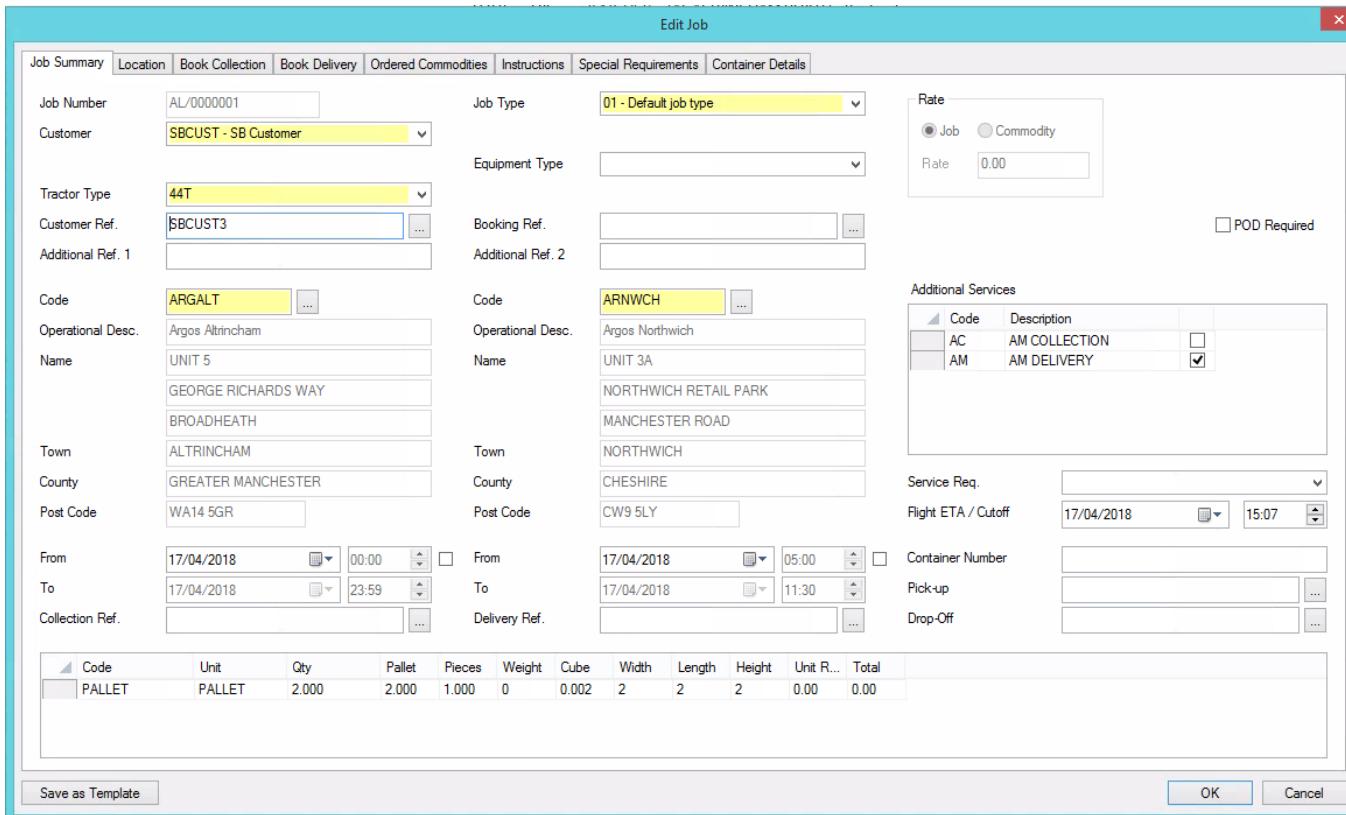
Change Job

The details of a job can be changed in ESP from the Order Pool using the Change Job Function. Details of changes made will be visible in the Job Audit.

Change Job Details

From the Order Pool

1. Right Click on the job that needs changing
2. Select Change Job



The screenshot shows the 'Edit Job' window with several tabs at the top: Job Summary, Location, Book Collection, Book Delivery, Ordered Commodities, Instructions, Special Requirements, and Container Details. The 'Job Summary' tab is active, displaying the following data:

Job Number	AL/0000001	Job Type	01 - Default job type	Rate	Job (radio button selected)																								
Customer	SBCUST - SB Customer	Equipment Type		Commodity	Rate 0.00																								
Tractor Type	44T	Booking Ref.		<input type="checkbox"/> POD Required																									
Customer Ref.	SBCUST3	Additional Ref. 1																											
Additional Ref. 1		Additional Ref. 2																											
Code	ARGALT	Code	ARNWCH	Additional Services																									
Operational Desc.	Argos Altrincham	Operational Desc.	Argos Northwich	Code	Description																								
Name	UNIT 5	Name	UNIT 3A	AC	AM COLLECTION																								
	GEORGE RICHARDS WAY		NORTHWICH RETAIL PARK	AM	AM DELIVERY <input checked="" type="checkbox"/>																								
	BROADHEATH		MANCHESTER ROAD																										
Town	ALTRINCHAM	Town	NORTHWICH																										
County	GREATER MANCHESTER	County	CHESHIRE																										
Post Code	WA14 5GR	Post Code	CW9 5LY																										
From	17/04/2018 00:00	From	17/04/2018 05:00	Service Req.																									
To	17/04/2018 23:59	To	17/04/2018 11:30	Flight ETA / Cutoff	17/04/2018 15:07																								
Collection Ref.		Delivery Ref.		Container Number																									
<table border="1"> <thead> <tr> <th>Code</th> <th>Unit</th> <th>Qty</th> <th>Pallet</th> <th>Pieces</th> <th>Weight</th> <th>Cube</th> <th>Width</th> <th>Length</th> <th>Height</th> <th>Unit R...</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>PALLET</td> <td>PALLET</td> <td>2.000</td> <td>2.000</td> <td>1.000</td> <td>0</td> <td>0.002</td> <td>2</td> <td>2</td> <td>2</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>						Code	Unit	Qty	Pallet	Pieces	Weight	Cube	Width	Length	Height	Unit R...	Total	PALLET	PALLET	2.000	2.000	1.000	0	0.002	2	2	2	0.00	0.00
Code	Unit	Qty	Pallet	Pieces	Weight	Cube	Width	Length	Height	Unit R...	Total																		
PALLET	PALLET	2.000	2.000	1.000	0	0.002	2	2	2	0.00	0.00																		
<input type="button" value="Save as Template"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>																													

Figure 133

The Edit Job window is displayed(Figure 133)

3. Click on the relevant tab and amend the details as required
4. Click OK

Change Job Restrictions

The following restrictions apply when changing job details:

Planned Jobs

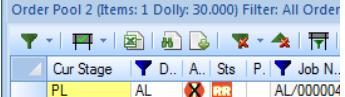
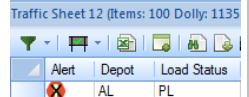
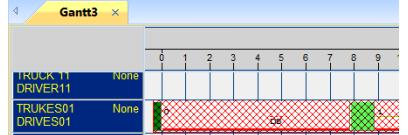
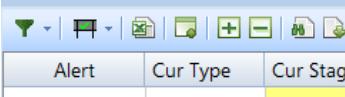
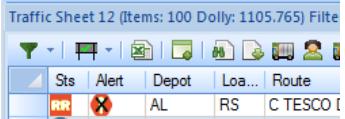
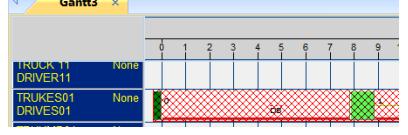
Details of the Collection and Delivery Location cannot be changed as this would invalidate the planned route

Completed Jobs

Job Details cannot be changed once a job has been completed/invoiced in GTS (completed jobs and loads are protected in ESP)

Job Amendments

When a Job is changed in ESP/GTS the details will be interfaced back through to the job in ESP. If the change impacts on the load after it has been allocated to a vehicle then the load may be shown as being hashed on the Gantt. See the Table below for further details.

Type of Change	Order Pool	Traffic Sheet	Gantt
Changes to Dates/Times or Collection/ Deliveries that impact on the Route	Revisit Route and Alert 	Revisit Route and Alert 	Hashing 
Minor Changes that do not impact on the Route – e.g. Changes to references	Order Pool 	Traffic Sheet 	Gantt The Alert will be displayed in the Load Manager window (Double Click on the Load on the Gantt)
Changes to Requirements for the Job e.g. a Requirement is added to the Job after it has been planned	Revisit Route and Major Alert 	Revisit Route and Major Alert 	Hashing 

Cancelling Orders

Orders can be cancelled from the Order Pool providing that they are at NP (Not Planned) Status.
 Note: Cancelling an order cannot be reversed

1. Locate the order to be cancelled in the Order Pool (applicable to 'NP' status orders only)
2. Right Click on the order
3. Select **Cancel Job**

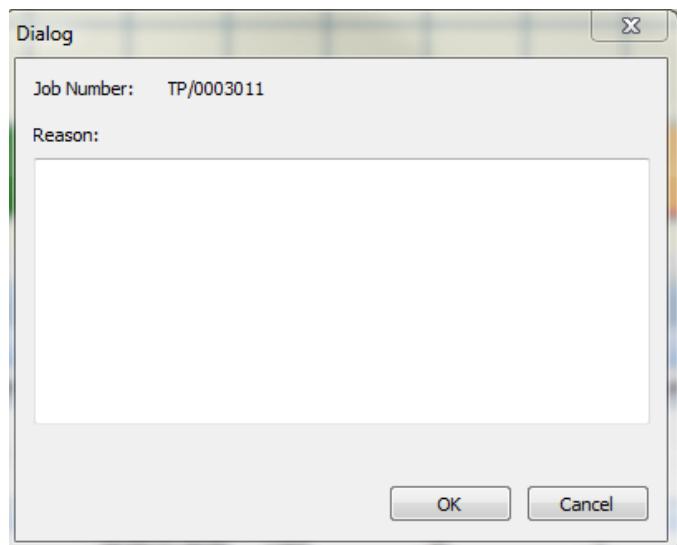


Figure 134

4. Key in a **Reason for the Cancellation**
5. Click **OK**

The Job will now be cancelled in ESP (removed from the order pool) and also cancelled in GTS (Job status change to CC)

Note on Split Jobs:

When Split jobs are cancelled the cancel job window doesn't appear (there is no need to enter a reason when cancelling a split) instead the Split Job cancelled message is displayed instead:

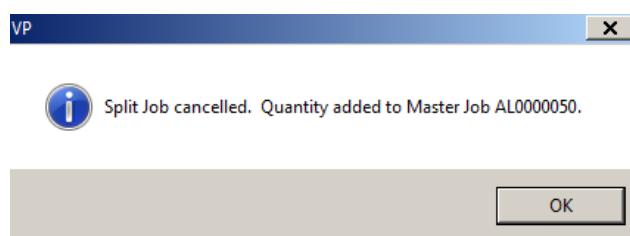


Figure 135

This message indicates that the volume for the split will be updated back against the master job allowing it to be split off again if necessary.

ESP Audit

Changes to jobs from within ESP are visible in the in ESP Audit Trail. These changes will also be visible in the GTS Audit Trail – See Note below.

Viewing Job Changes – Audit

1. Right Click on any Job from the Order Pool
2. Click 

Any changes made will be visible in the audit window

Job Audit For - AL/0000008						
Job Num...	Table Na...	Field Name	Old...	N..	Changed Date	Chan...
AL/0000008	Job Details	Commodity Total Updated			24/04/18 11:36	barkers
AL/0000008	Job Details	Status	NEW	BK	24/04/18 11:36	barkers
AL/0000008	Job Details	Job Created			24/04/18 11:36	barkers

Select Table:	All	▼	<input checked="" type="radio"/> Summary	<input type="radio"/> Detailed	Cancel
---------------	-----	---	--	--------------------------------	--------

Figure 136

There are three levels of audit data to select from, Job Details, Load or All. The detailed view shows more information from the audit, in the screenshot above the first line indicates the commodity total has been updated. By changing the view to detailed, the actual quantity changes that have been made are also visible:

Job Audit For - AL/0000008						
Job Num...	Table Na...	Field Name	Old ...	Ne...	Changed Date	Chan...
AL/0000008	Job Details	• Total Schedule 2	0.000	1.000	24/04/18 11:36	barkers
AL/0000008	Job Details	• Total Schedule 1	0.000	2.000	24/04/18 11:36	barkers
AL/0000008	Job Details	• Total Cube	0.000	0.002	24/04/18 11:36	barkers
AL/0000008	Job Details	• Total Weight	0.000	2.000	24/04/18 11:36	barkers
AL/0000008	Job Details	Commodity Total Updated			24/04/18 11:36	barkers
AL/0000008	Job Details	Status	NEW	BK	24/04/18 11:36	barkers
AL/0000008	Job Details	Job Created			24/04/18 11:36	barkers

Select Table:	Job Details	▼	<input type="radio"/> Summary	<input checked="" type="radio"/> Detailed	Cancel
---------------	-------------	---	-------------------------------	---	--------

Searching for Job Changes

1. From the Menu in ESP
2. Click Tools, Job Change History

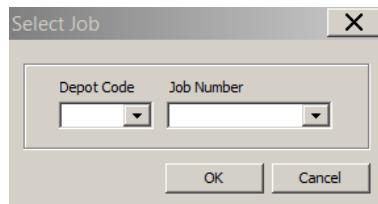


Figure 137

3. Select a Depot Code
4. Key in a Job Number
5. Click OK

The Audit window for the Job will be displayed:

Job Number	Table Name	Field Name	Old Value	New Value	Changed Date	Change Type
FA/0000762	Job Details	Delivery Geographic Id	24	59	02/06/16 17:04	Sue B.
FA/0000762	Job Details	Delivery Location	** TILDOV	** SANMAN	02/06/16 17:04	Sue B.
FA/0000762	Job Details	Total Collected Cube	0.000	0.000	02/06/16 17:04	Sue B.
FA/0000762	Job Details	Total Collected Schedule 1	0.000	0.000	02/06/16 17:04	Sue B.
FA/0000762	Job Details	Total Collected Schedule 2	0.000	0.000	02/06/16 17:04	Sue B.
FA/0000762	Job Details	Total Collected Weight	0.000	0.000	02/06/16 17:04	Sue B.
FA/0000762	Job Details	Total Collected Cube		0.000	31/05/16 12:39	GTSO!
FA/0000762	Job Details	Total Collected Schedule 1		0.000	31/05/16 12:39	GTSO!
FA/0000762	Job Details	Total Collected Schedule 2		0.000	31/05/16 12:39	GTSO!
FA/0000762	Job Details	Total Collected Weight		0.000	31/05/16 12:39	GTSO!
FA/0000762	Job Details	Total Cube	0.000	0.003	31/05/16 12:39	GTSO!
FA/0000762	Job Details	Total Schedule 1	0.000	3.000	31/05/16 12:39	GTSO!

Figure 138

Load Audit

Audit details are available for Loads from either the Traffic Sheet, Supplier Bin or Gantt Chart

1. Locate the Load from either the Traffic Sheet, Supplier Bin or Gantt Chart ,
2. Right Click on the Load, Click **Audit**
3. Click Either the Summary or Detailed view from the bottom of the window to show the audit details for the load

Summary View – Shows a summary of changes to the load

Audit for Load 238750

Stop	Event	Old Value	New Value	Changed Date	Change
	Change Load Stage	Previous Stage - PL	New Stage - RS	02/06/16 12:37	barker
	Resource(s) Updated			02/06/16 12:37	barker
	Load Start Time Changed	03/06/16 14:00	03/06/16 14:01	02/06/16 12:10	jacob
	Load Start Time Changed	03/06/16 22:15	03/06/16 14:00	02/06/16 11:39	barker
	Load Start Time Changed	03/06/16 09:15	03/06/16 22:15	02/06/16 11:39	barker
	Load Start Time Changed	03/06/16 09:16	03/06/16 09:15	02/06/16 11:38	barker
	Load Start Time Changed	03/06/16 09:00	03/06/16 09:16	02/06/16 11:38	barker
	Load Start Time Changed	03/06/16 06:00	03/06/16 09:00	02/06/16 11:38	barker
	Load Start Time Changed	03/06/16 06:00	03/06/16 06:00	02/06/16 11:35	barker
	Load Start Time Changed	03/06/16 07:00	03/06/16 07:00	02/06/16 11:35	barker
	Add Placeholder To Load		Placeholder - Hemel Depot added to ...	02/06/16 11:34	barker
	Load Start Time Changed	03/06/16 00:00	03/06/16 14:00	02/06/16 11:33	barker

Summary Detailed

Cancel

Detailed View - Shows Leg by Leg details of changes to the load

Audit for Load 238750

Stop	Event	Old Value	New Value	Changed Date	Change
	Change Load Stage	Previous Stage - PL	New Stage - RS	02/06/16 12:37	barker
4	Tractor Updated Inbound		New - GN56 KKP	02/06/16 12:37	barker
3	Tractor Updated Outbound		New - GN56 KKP	02/06/16 12:37	barker
3	Tractor Updated Inbound		New - GN56 KKP	02/06/16 12:37	barker
2	Tractor Updated Outbound		New - GN56 KKP	02/06/16 12:37	barker
2	Tractor Updated Inbound		New - GN56 KKP	02/06/16 12:37	barker
1	Tractor Updated Outbound		New - GN56 KKP	02/06/16 12:37	barker
	Resource(s) Updated			02/06/16 12:37	barker
	Load Start Time Changed	03/06/16 14:00	03/06/16 14:01	02/06/16 12:10	jacob
	Load Start Time Changed	03/06/16 22:15	03/06/16 14:00	02/06/16 11:39	barker
	Load Start Time Changed	03/06/16 09:15	03/06/16 22:15	02/06/16 11:39	barker
	Load Start Time Changed	03/06/16 09:16	03/06/16 09:15	02/06/16 11:38	barker

Summary Detailed

Cancel

ESP Deleted Loads Audit

An Audit of loads deleted. This will record all loads deleted, even if the load was empty at the time of deletion

1. From the menu bar select: **Tools, Deleted Loads**

The Deleted Loads Audit window will be displayed:

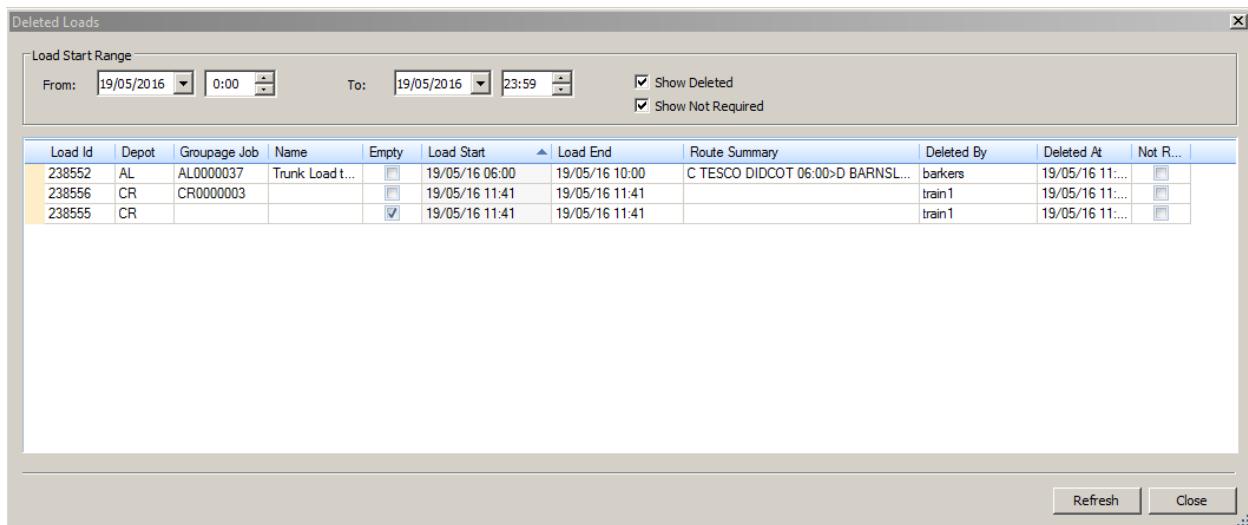


Figure 139

2. Enter a date/time range
3. Select to either show Deleted (Deleted Loads) and/or Show Not Required (Shells marked as not required) then Click the Refresh button
4. This will refresh the information displayed for the date range entered

Capacity Checking

The following rules govern what happens with capacity checking on the Traffic Sheet, Gantt Chart and Order Pool.

ESP Defaults

This is the first level, if capacities are set in ESP Admin then these will be used by default and appropriate capacity warnings will be displayed for each Job that does not meet the requirements when a load is built

Tractor Type on the Leg

If there are capacity details held in the Tractor Type Master file for the Default Tractor Type that the leg has been raised against in GTS, then these will be used instead of the ESP Defaults and will capacity check .

Resourced Tractor Type

If there are capacity details held in the Tractor Type Master file for the Tractor Type that the leg has been Resourced against in ESP, then these will be used instead of the ESP Defaults.

Resourced Trailer Type

If there are capacity details held in the Equipment Type Master file for the Equipment Type that the leg has been Resourced in ESP, then these will be used instead of the ESP Defaults.

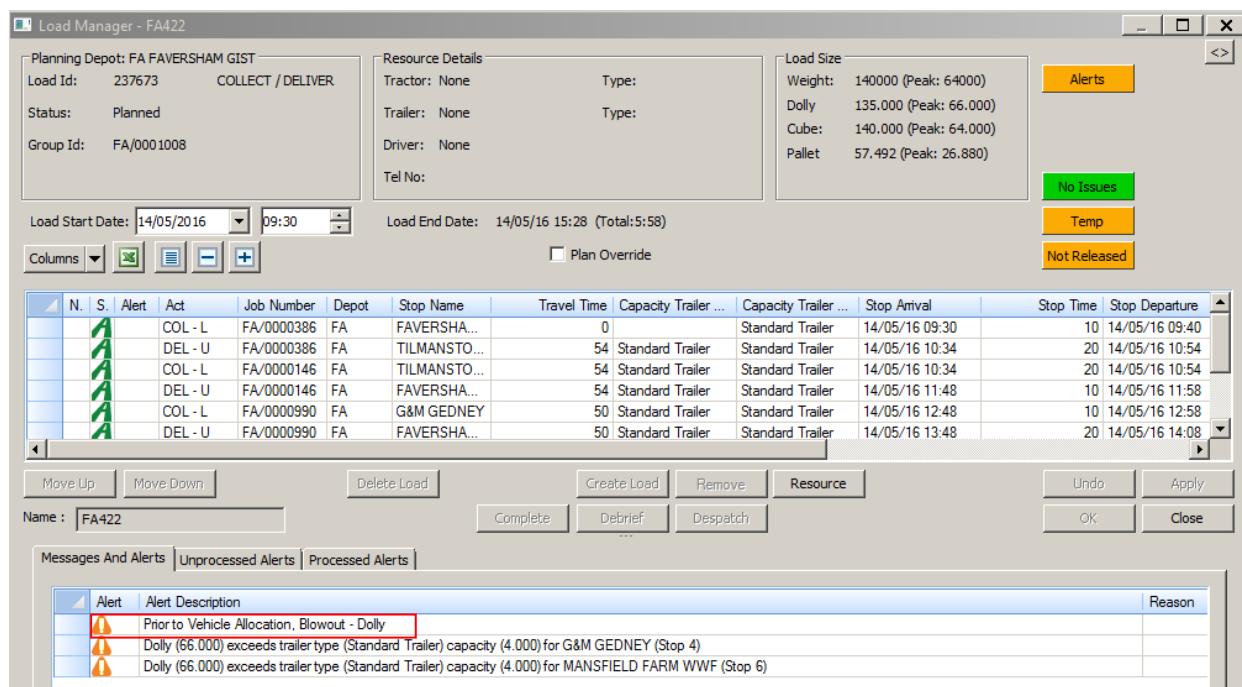
The colours and labels displayed on the Gantt chart and Traffic Sheet are set in ESP Options (See the section on Customising ESP for details) The colours indicate over or under capacity on the Gantt and also on the Sched one column in the Traffic sheet.

Note: If ESP system defaults are set to capacity check against both tractor and trailer, then the lowest of each scheduling equivalent will be used.

Capacity Checking in the Load Manager

Over capacity alerts are visible in the load manager before/after resources are applied (prior to resource allocation depends upon the ESP admin setting to check prior to primary resource allocation being switched on)

If the load has been created from a shell the capacity trailer type can also be used to display capacity alerts prior to resource allocation.



The screenshot shows the Load Manager interface for load FA422. At the top, it displays planning details: Planning Depot: FA FAVERSHAM GIST, Load Id: 237673, Status: Planned, Group Id: FA/0001008. Below this are sections for Resource Details (Tractor: None, Type: Standard Trailer; Trailer: None, Type: Standard Trailer; Driver: None, Tel No:), Load Size (Weight: 140000 (Peak: 64000), Dolly: 135.000 (Peak: 66.000), Cube: 140.000 (Peak: 64.000), Pallet: 57.492 (Peak: 26.880)), and Alerts (No Issues, Temp, Not Released). The main area shows a traffic sheet with stops and alerts. The traffic sheet table has columns: N, S, Alert, Act, Job Number, Depot, Stop Name, Travel Time, Capacity Trailer ... (Actual), Capacity Trailer ... (Planned), Stop Arrival, Stop Time, Stop Departure. The stops listed are: COL - L (FA/0000386, FA, FAVERSHA..., 0, Standard Trailer, 14/05/16 09:30, 10, 14/05/16 09:40), DEL - U (FA/0000386, FA, TILMANSTO..., 54, Standard Trailer, 14/05/16 10:34, 20, 14/05/16 10:54), COL - L (FA/0000146, FA, TILMANSTO..., 54, Standard Trailer, 14/05/16 10:34, 20, 14/05/16 10:54), DEL - U (FA/0000146, FA, FAVERSHA..., 54, Standard Trailer, 14/05/16 11:48, 10, 14/05/16 11:58), COL - L (FA/0000990, FA, G&M GEDNEY, 50, Standard Trailer, 14/05/16 12:48, 10, 14/05/16 12:58), and DEL - U (FA/0000990, FA, FAVERSHA..., 50, Standard Trailer, 14/05/16 13:48, 20, 14/05/16 14:08). At the bottom, there are buttons for Move Up, Move Down, Delete Load, Create Load, Remove, Resource, Undo, Apply, Complete, Debrief, Despatch, OK, and Close. A message bar at the bottom indicates 'Messages And Alerts' with three alerts: 'Prior to Vehicle Allocation, Blowout - Dolly', 'Dolly (66.000) exceeds trailer type (Standard Trailer) capacity (4.000) for G&M GEDNEY (Stop 4)', and 'Dolly (66.000) exceeds trailer type (Standard Trailer) capacity (4.000) for MANSFIELD FARM WWWF (Stop 6)'.

Capacity Checking on the Gantt Chart

In the example below the Red border indicates the vehicle is now above the over capacity defaults set for the user. This is indicated by the solid red border around the load, also the trailer is 100% full. (the users over capacity threshold is set to 99% or above)



Capacity Checking in the Traffic Sheet

The over capacity colours (see section on Customising ESP for details) are also represented on the Traffic Sheet.

Traffic Sheet 2 (Items: 2 Dolly; 38.080) Filter: All Loads						
S.	Load Id	Loa...	T	D	Route	Peak Sched One
1	239848	sb	B.	B..	S BRDL25 GL1 GLOUCESTER 00:00...	19
2	239849	sb	B.		C Stone Depot 06:54>D ABC LIVERPO...	19

Identify Jobs

The Identify Jobs allows jobs to Group, Return jobs, Next Tramper and Matching Jobs to be displayed for the load. These functions display legs that are compatible for grouping or legs that could be planned for a vehicle coming back to the depot, helping to minimize empty running.

Matching Jobs

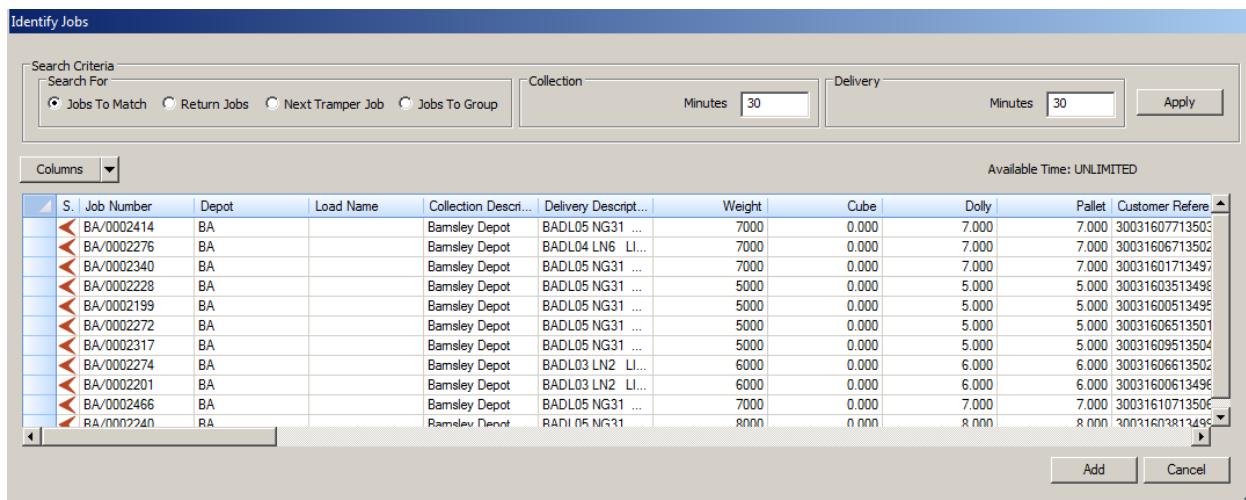
When Jobs are planned to a load the find matching jobs function can be used. The Jobs displayed have their collection and delivery times compared with the stop on the load, plus or minus any tolerance displayed at the top of the window.

Find Matching Jobs

From the Load Manager Window:

1. Right Click on the relevant stop
2. Select Identify, Jobs to Match

The identify Jobs window will now be displayed.



S.	Job Number	Depot	Load Name	Collection Description	Delivery Description	Weight	Cube	Dolly	Pallet	Customer Reference
1	BA/0002414	BA		Bamsley Depot	BADL05 NG31 ...	7000	0.000	7.000	7.000	30031607713503
2	BA/0002276	BA		Bamsley Depot	BADL04 LN6 LI...	7000	0.000	7.000	7.000	30031606713502
3	BA/0002340	BA		Bamsley Depot	BADL05 NG31 ...	7000	0.000	7.000	7.000	30031601713497
4	BA/0002228	BA		Bamsley Depot	BADL05 NG31 ...	5000	0.000	5.000	5.000	30031603513498
5	BA/0002199	BA		Bamsley Depot	BADL05 NG31 ...	5000	0.000	5.000	5.000	30031600513495
6	BA/0002272	BA		Bamsley Depot	BADL05 NG31 ...	5000	0.000	5.000	5.000	30031606513501
7	BA/0002317	BA		Bamsley Depot	BADL05 NG31 ...	5000	0.000	5.000	5.000	30031609513504
8	BA/0002274	BA		Bamsley Depot	BADL03 LN2 LI...	6000	0.000	6.000	6.000	30031606613502
9	BA/0002201	BA		Bamsley Depot	BADL03 LN2 LI...	6000	0.000	6.000	6.000	30031600613496
10	BA/0002466	BA		Bamsley Depot	BADL05 NG31 ...	7000	0.000	7.000	7.000	30031610713506
11	RA/0012240	RA		Ramsley Depot	RANI 05 NG31	8000	0.000	8.000	8.000	30031603813495

3. Adjust the Collection or Delivery minutes if required
4. Select any jobs as required and Click **Add** to add the matching jobs to the load

Return Jobs

The Return Jobs function will find Jobs that are within the vicinity, Jobs found can be planned to return the vehicle back to the depot. Jobs will be found providing they match the following criteria:

- ESP Defaults are used to display the search radius information in the window and also determine if the function is available on despatch
- The Collection and Delivery Radius and Minutes can be adjusted to find jobs nearer or further away from the current load

Adding a Return Job

From the Traffic Sheet, Gantt Chart or Order Pool

1. Right click on the Load(Job)
2. Click Identify Jobs
3. Click Return Jobs

ESP will search for jobs that match the criteria outlined earlier. The Return Jobs window will be displayed

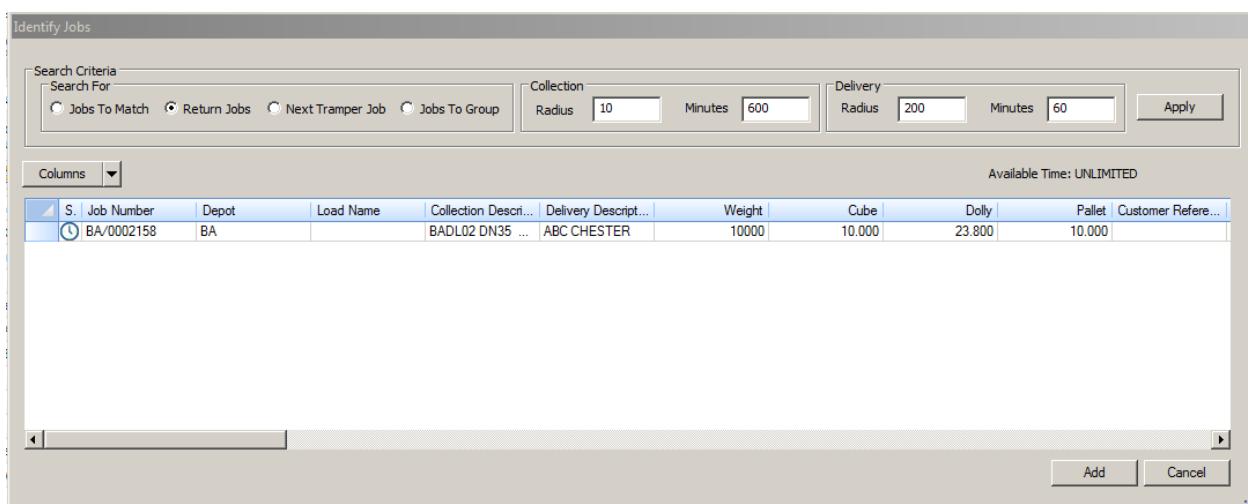


Figure 140

4. Click on any job from the list
5. Click Add to include the job in the load (Note: the Add button will only be available if the relevant setting in ESP Admin – Identify Job Defaults is selected)
6. Click Cancel to cancel out of the window without selecting a job

Next Tramper Jobs

This search will find jobs that start within the specified radius from the end location on the load (within the specified number of minutes), regardless of where the jobs finish.

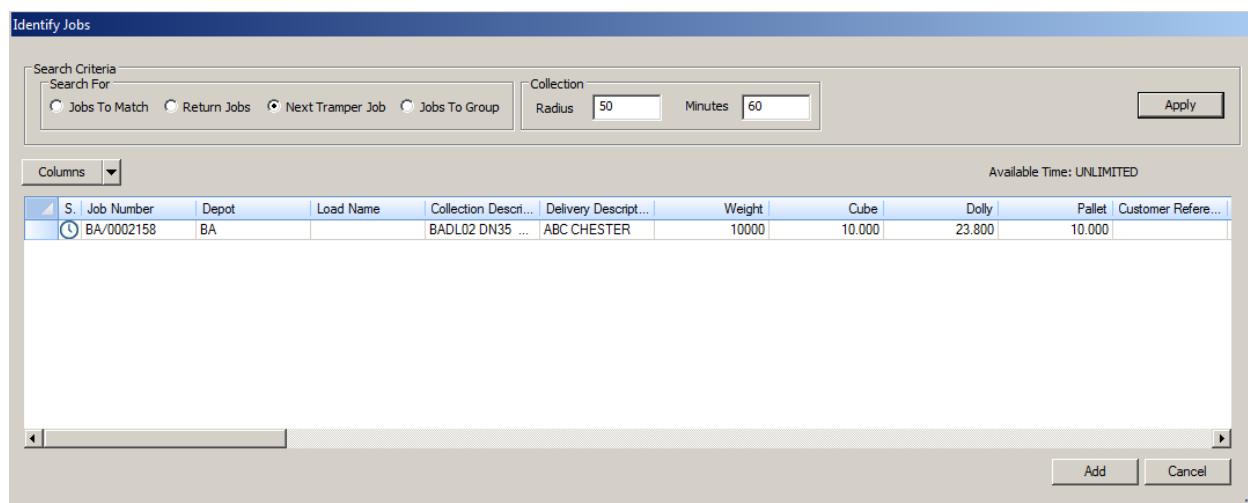
The start location will be the stop(location) on the load from where the Identify Jobs function was selected

- ESP Defaults are used to display the search radius information in the window and also determine if the function is available on despatch
- The Collection Radius and Minutes can be adjusted to find jobs nearer or further away from the current stop selected in the load

From the Traffic Sheet, Gantt Chart or Order Pool

1. Right click on the Load(Job)
2. Click Identify Jobs
3. Click Next Tramper Jobs
4. Click **Apply**

ESP will search for jobs that match the criteria outlined earlier. The Next Tramper Jobs window will be displayed



The screenshot shows the 'Identify Jobs' dialog box. In the 'Search Criteria' section, the 'Next Tramper Job' radio button is selected. The 'Collection Radius' is set to 50 and 'Minutes' to 60. An 'Apply' button is visible. Below this, a table displays search results:

S.	Job Number	Depot	Load Name	Collection Descri...	Delivery Descript...	Weight	Cube	Dolly	Pallet	Customer Refere...
1	BA/0002158	BA	BADL02 DN35 ...	ABC CHESTER		10000	10.000	23.800	10.000	

At the bottom right of the dialog are 'Add' and 'Cancel' buttons.

Note: Tramper drivers are identified in the GTS Driver Master File.

Jobs to Group

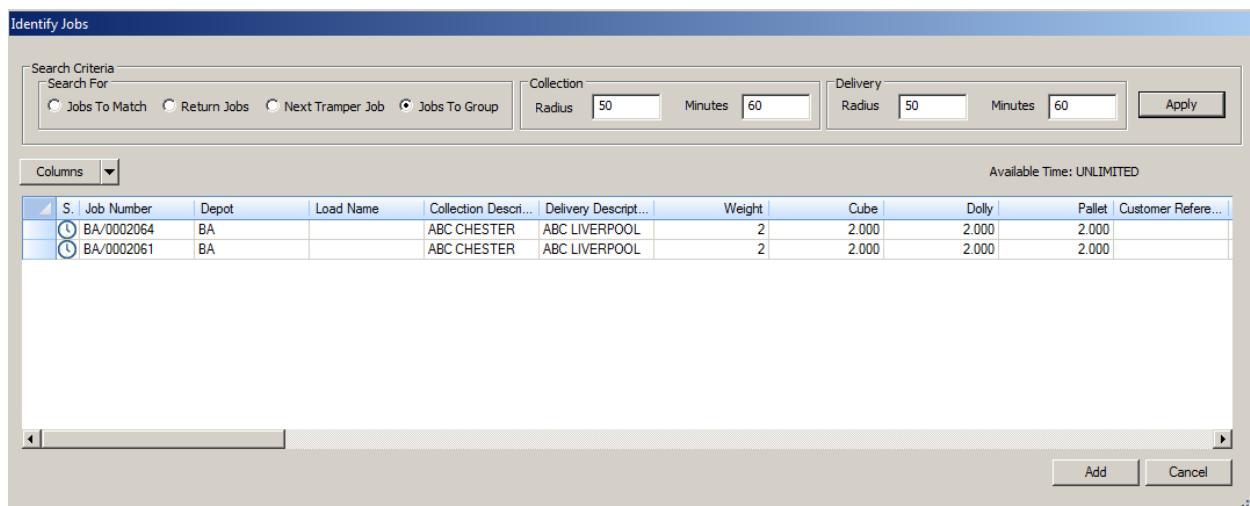
The Jobs to Group function will find and display Jobs that are suitable to group with the selected Job providing they match the following criteria:

- ESP Defaults are used to display the search radius information in the window and also determine if the function is available on despatch
- The Collection and Delivery Radius and Minutes can be adjusted to find jobs nearer or further away from the current load

Finding Jobs to Group

1. Right Click on the **Load(Job)** from either the **Gantt** or **Order Pool**
2. Click Identify Jobs
3. Click Jobs to Group

The **Identify Jobs to Group** window is displayed (Figure 141)



The screenshot shows the 'Identify Jobs' dialog box. At the top, there's a 'Search Criteria' section with radio buttons for 'Jobs To Match', 'Return Jobs', 'Next Tramper Job', and 'Jobs To Group'. Under 'Jobs To Group', 'Collection Radius' is set to 50 and 'Minutes' is set to 60. Similarly, under 'Delivery', 'Radius' is 50 and 'Minutes' is 60. An 'Apply' button is to the right. Below this is a 'Columns' dropdown and a table titled 'Available Time: UNLIMITED'. The table has columns: S., Job Number, Depot, Load Name, Collection Descri..., Delivery Descript..., Weight, Cube, Dolly, Pallet, and Customer Refere... . Two rows are visible: BA/0002064 and BA/0002061, both from BA depot to ABC CHESTER, ABC LIVERPOOL, weight 2, cube 2.000, dolly 2.000, pallet 2.000.

Figure 141

4. Highlight the relevant job(s) in the window and click **Add**

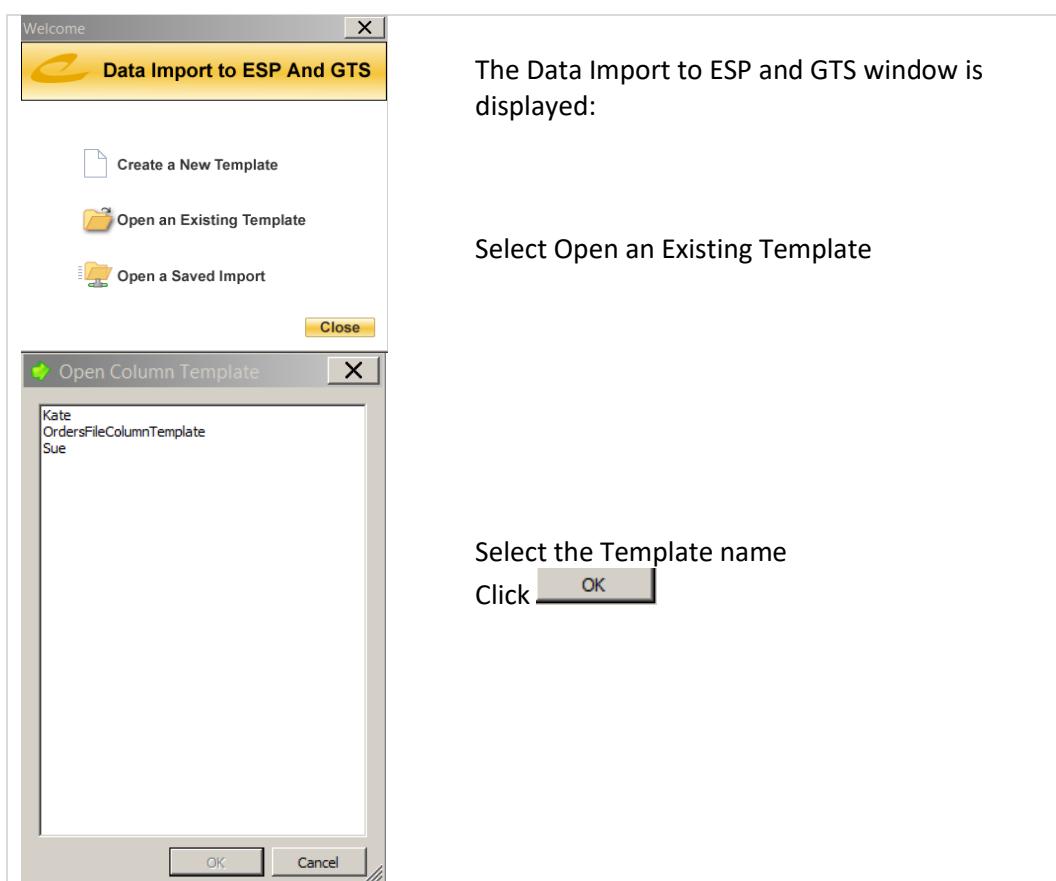
The Job will be added to the current load

Order Import

Data can be imported into GTS/ESP using the import utility. Templates need to be setup for users (see the order import guide for further details) Data needs to match the template and also needs to be saved in either Excel or csv file format.

Open and Use an Import Template

5. From the ESP Menu
6. Click Tools, Import Orders



The Template window will be displayed:

ESS Data Import [Template:Sue]													
Template		Import		Data		View		Application					
Depot Code	Customer Code	Shipper Code	Job Type Code	Collection Location Code	Delivery Location Code	Earliest Collection Date	Earliest Delivery Date	Product Code	Unit of Measure	Quantity	Temperature Category	Latest Collection Date	Latest Delivery Date
01	ABC		1 ABCCHE	ABCWRE	Pallet	Pallet	20	30/08/2013 00:00	30/08/2013 00:00	30/08/2013 23:59	31/08/2013 23:59		
01	ABC		1 ABCCHE	ABCWRE	Pallet	Pallet	20	30/08/2013 00:00	30/08/2013 00:00	30/08/2013 23:59	31/08/2013 23:59		

The Excel/CSV file must match the template (left to right):

A	B	C	D	E	F	G	H	I	J	K	L
DEPOT	Customer	Job type	Coll	Del	Commod	Unit	Qty	colstart	delstart	colend	delend
01	ABC		1 ABCCHE	ABCWRE	Pallet	Pallet	20	30/08/2013 00:00	30/08/2013 00:00	30/08/2013 23:59	31/08/2013 23:59
01	ABC		1 ABCCHE	ABCWRE	Pallet	Pallet	20	30/08/2013 00:00	30/08/2013 00:00	30/08/2013 23:59	31/08/2013 23:59

From the ESP Menu

1. Click Import, Import, Import Orders
2. Browse to the location of the file, select the File and click OK
3. The Import Result window will be displayed, Click OK

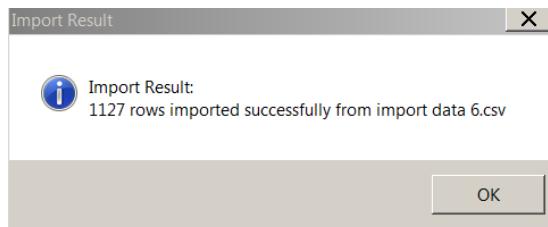
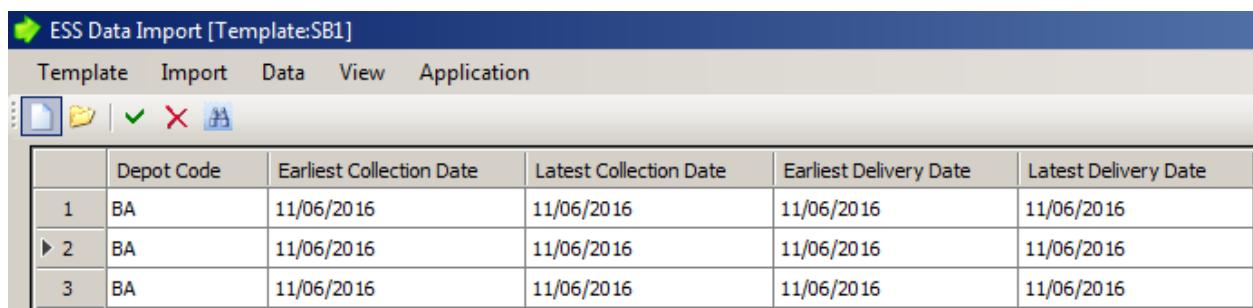


Figure 142

4. Next, ESP will validate the data in the file, any errors will be marked with an exclamation mark



The screenshot shows the ESS Data Import interface with a blue header bar containing the title 'ESS Data Import [Template:SB1]' and menu items: Template, Import, Data, View, Application. Below the header is a toolbar with icons for New, Open, Save, and others. The main area is a data grid with the following data:

	Depot Code	Earliest Collection Date	Latest Collection Date	Earliest Delivery Date	Latest Delivery Date
1	BA	11/06/2016	11/06/2016	11/06/2016	11/06/2016
► 2	BA	11/06/2016	11/06/2016	11/06/2016	11/06/2016
3	BA	11/06/2016	11/06/2016	11/06/2016	11/06/2016

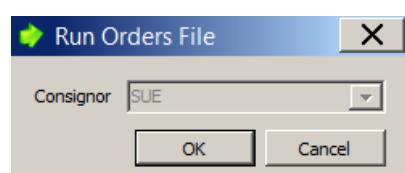
Figure 143

If errors exist they must be corrected before the import can be run and the orders generated.

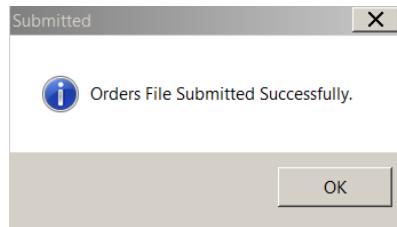
5. Right Click on the line for the order and Click View Errors
6. Correct any errors by overtyping invalid entries or by correcting the import file and importing the file again.

Note: To import the file again the Import screen can be cleared, From the Menu, Click Data, Clear Grid.

7. Once the screen is clear of any errors, the data can be sent to GTS to create the orders:
8. From the Menu, Click Import, Run Orders File
9. Click OK at the Run Orders File Prompt



10. Click OK to close the Orders file submitted successfully message



The Grid can be cleared and further orders file(s) imported if required.

11. Close the import function, from the Menu, Click Application, Exit.

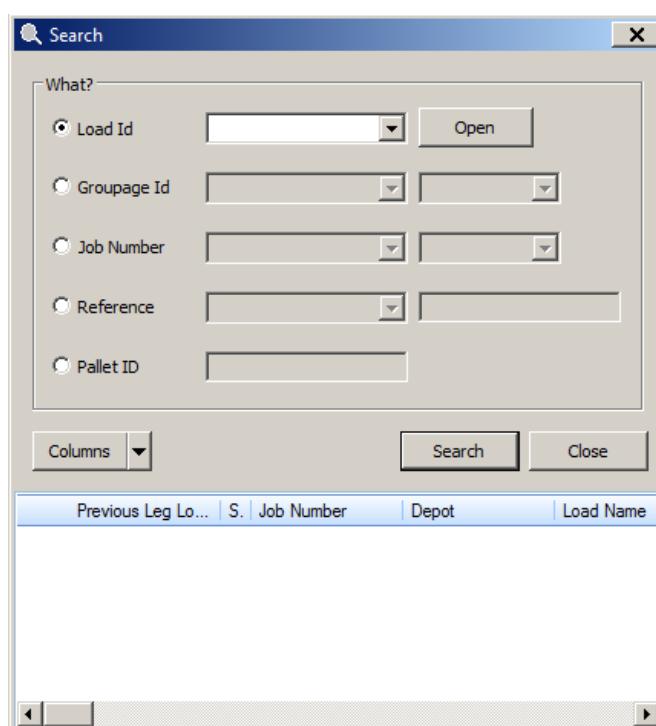
Search Facility

The Search facility can be used to find jobs by Depot Code & Job Number or by Customer/Booking/Collection/Delivery Reference.

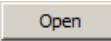
Search by Job, or Reference

From the Main Toolbar:

1. Click  to access the Search window (Figure 144)
2. Click the drop down arrow by Depot Code and Select the relevant Depot (alternatively the Depot Code can be keyed in)
3. Click into the Job Number/Groupage Id field and key in the job number to search for



Alternatively:

4. Click in the Load ID field and key in a Load Id, Click  to open the Load

Or

5. Click in the Reference field and select from either Customer, Booking, Collection, Delivery Reference or Container Number.
6. Key in the Reference to be searched for
7. Or, Key in a Pallet ID
8. Click Search

All legs/Jobs found will be displayed in the Search for window (Figure 144)

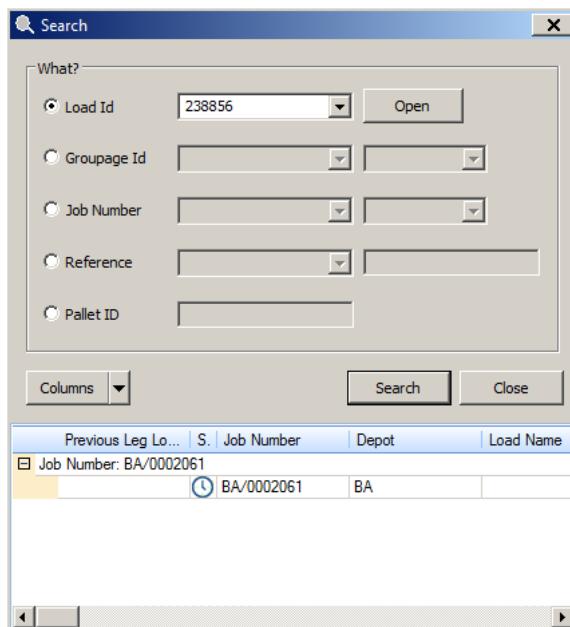


Figure 144

9. Right Click on the Job/Leg found and Select the location for the Job (Order Pool, Traffic Sheet etc.) the job will be highlighted in the location where found.
10. Alternatively Right Click on the Job and select Open Load Manager to view the Load Manager Window

Right Click Options from the Search Window:

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Open Load Manager</td></tr> <tr> <td style="padding: 2px;">Properties</td></tr> <tr> <td style="padding: 2px;">Highlight In Charts</td></tr> <tr> <td style="padding: 2px;"><input checked="" type="checkbox"/> Highlight In Order Pool 1</td></tr> <tr> <td style="padding: 2px;"><input checked="" type="checkbox"/> Highlight In Traffic Sheet 3</td></tr> </table>	Open Load Manager	Properties	Highlight In Charts	<input checked="" type="checkbox"/> Highlight In Order Pool 1	<input checked="" type="checkbox"/> Highlight In Traffic Sheet 3	<ul style="list-style-type: none"> • Open Load Manager(open the load) if this option is greyed out the job hasn't been planned to a load (NP Status) • View Job Properties (see details of the job) • Highlight in Charts (available if the load has been planned to a vehicle) • <input checked="" type="checkbox"/> Indicates the Job is Filtered out of The window in this example Order Pool1 • <input checked="" type="checkbox"/> Indicates the Job is visible in the relevant window in this example the Traffic Sheet 3
Open Load Manager						
Properties						
Highlight In Charts						
<input checked="" type="checkbox"/> Highlight In Order Pool 1						
<input checked="" type="checkbox"/> Highlight In Traffic Sheet 3						

Find in Charts

The find in charts option locates loads on the Gantt Chart that have been allocated Tractor resource.

1. Locate the load in the Order Pool or Traffic Sheet
2. Right Click on the Load
3. Select **Find in Charts**

The Load will be highlighted on the Gantt:

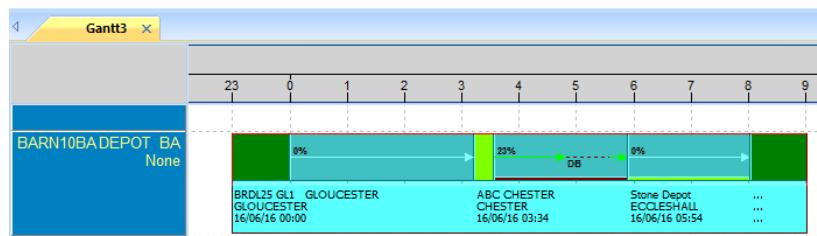


Figure 145

Show As Gantt

The Show as Gantt option allows the user to see the what the load looks like from the Traffic sheet as a mini gantt without having the Gantt Chart open

1. Locate the Job in the Traffic Sheet/Order Pool (The job must be planned to a load and the load must be allocated to a vehicle)
2. Right Click on the Job/Load
3. Select **Show as Gantt**

The Gantt Resource line for the Job/Load will be displayed:

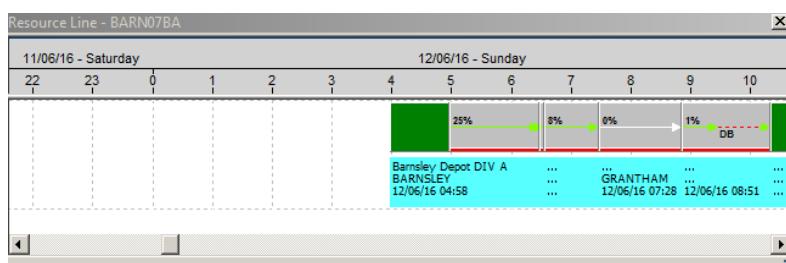


Figure 146

Search for Legs of a Job

The search for all legs of a job function locates corresponding legs of a job. This function is available from the Order Pool.

1. Locate the Job in the Order Pool
2. Right Click on the Job
3. Select Search for Legs of this job

The search window will be displayed showing details of any legs found:

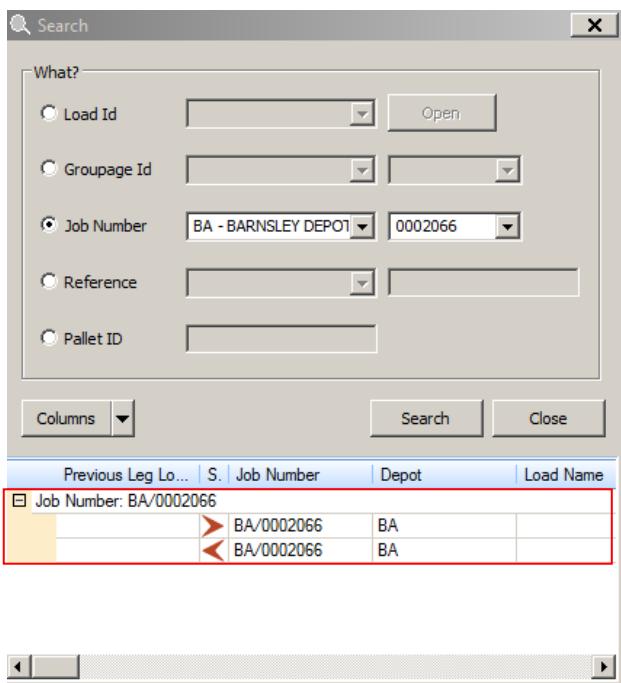


Figure 147

Open Next/Previous Load

The open next/previous load function is available from the load manager and allows the onward or previous legs of a job to be displayed if they have been allocated to a load. This function is available from the Load Manager.

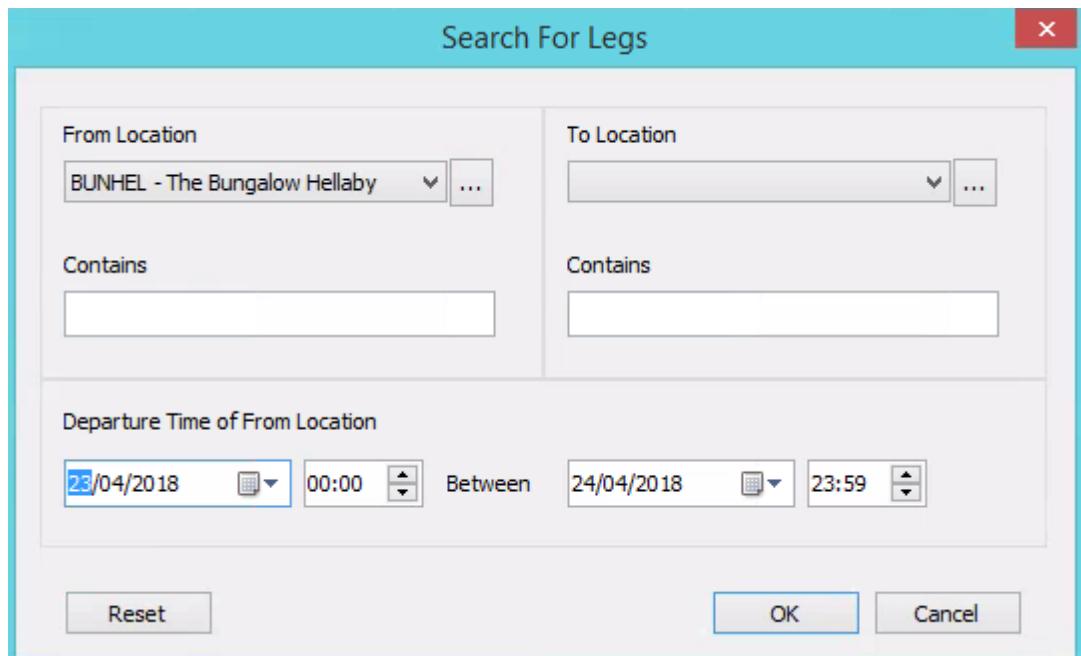
1. Locate the Leg in the Load Manager
2. Right Click on the Leg
3. Click either Open Next Load or Open Previous Load

The Load Manager for the leg will be displayed.

Search for Legs (Traffic Sheet)

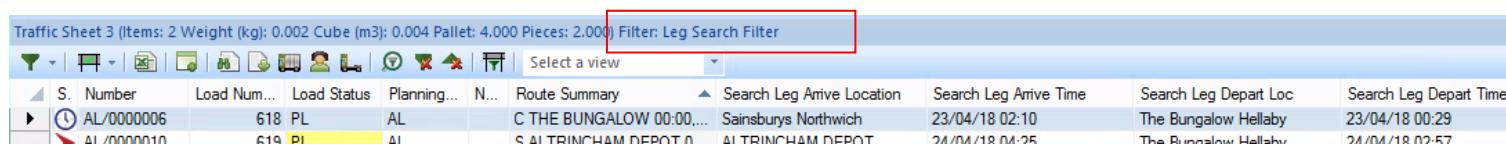
The search for all legs function available from the traffic sheet opens a search dialog, search criteria can be selected and the traffic sheet will be filtered to show loads that have legs that match the search.

1. From the Traffic Sheet Toolbar, Click Search for Legs 
2. Enter search criteria into the search for legs window and click OK



The Traffic Sheet will now be filtered to show loads that contain legs that match the search criteria

Traffic Sheet 3 (Items: 2 Weight (kg): 0.002 Cube (m3): 0.004 Pallet: 4.000 Pieces: 2.000) Filter: Leg Search Filter



S. Number	Load Num...	Load Status	Planning...	N...	Route Summary	Search Leg Arrive Location	Search Leg Arrive Time	Search Leg Depart Loc	Search Leg Depart Time
AL/0000006	618	PL	AL		C THE BUNGALOW 00:00,... Sainsburys Northwich	23/04/18 02:10		The Bungalow Hellaby	23/04/18 00:29
AL/0000010	619	PL	AL		S ALTRINCHAM DEPOT 0... ALTRINCHAM DEPOT	24/04/18 04:25		The Bungalow Hellaby	24/04/18 02:57

To Remove the Filter

3. Click the remove filters button 

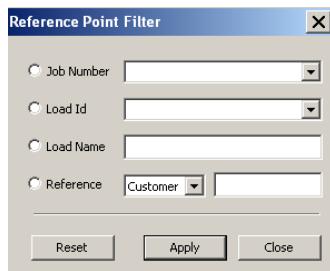
Order Pool and Traffic Sheet Specific Search Tools

Order Pool & Traffic Sheet

Reference Point Filter Search

From the Order Pool or Traffic Sheet

1. Click 



2. Click on either Job Number, Load Id, Load Name, Reference

Job Number -	Key in the whole Job number e.g. ER/0000049
Load ID -	Key in the whole Load ID e.g. 16340
Load Name -	Key the whole or part of the Load Name (keying in SB will find load names SBLOAD, LOADSB, LO1SBA etc.)
Reference -	Select from Customer, Booking, Collection or Delivery, then key in the Reference or Part of the Reference (keying in SB will find jobs with Reference 123SB, 12SB3, SB123 etc.)

3. Click Apply

The Search filter will now be applied to the window:

Order Pool 1 (Items: 1 Dolly: 4.000)				
	Job Number	S.	Customer Refere...	Depot
	BA/0002042	A	ED0206160944	BA

Figure 148

Customer/Location/Stage Filter Search

From the Order Pool or Traffic Sheet:

1. Click 

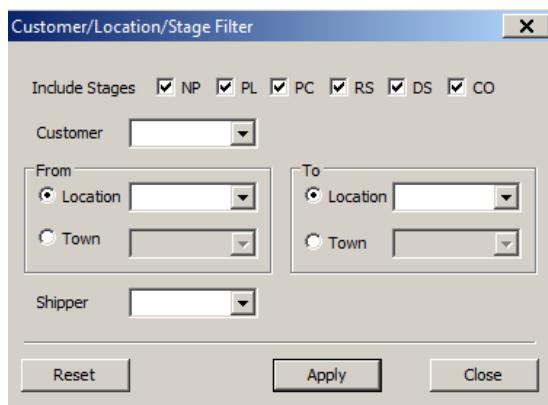


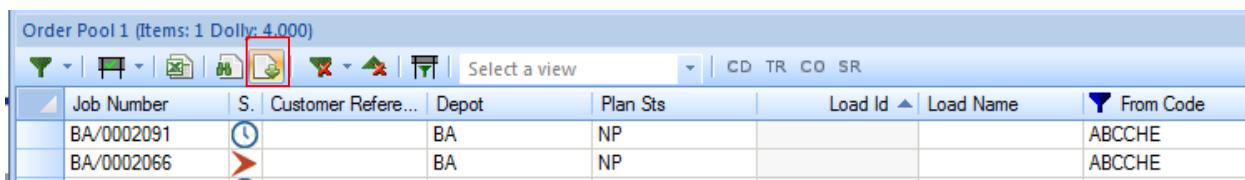
Figure 149

Select one or a combination of the following fields:

Include Stages –	Select which stages to include
Trip Type -	Select the Trip Type (only visible if switched on in ESP admin)
Category -	Select the Category (only visible if switched on in ESP admin)
Customer -	Select the Customer
From Location/Town -	Select the Collection Location or Town
To Location/Town -	Select the Delivery Location or Town
Shipper -	Select the Shipper (ESP Chilled only)

2. Click **Apply**

The filter will be applied to the Order Pool/Traffic Sheet:



Order Pool 1 (Items: 1 Dolly: 4.000)							
	S.	Customer Refere...	Depot	Plan Sts	Load Id	Load Name	From Code
BA/0002091			BA	NP			ABCCHE
BA/0002066			BA	NP			ABCCHE

Figure 150

Remove the Filter

From the Order Pool or Traffic Sheet:

1. Click  or 
2. Click **Reset**
3. Click **Close**

Traffic Sheet Specific Searches

Tractor Filter Search

- From the Traffic Sheet:

- Click 

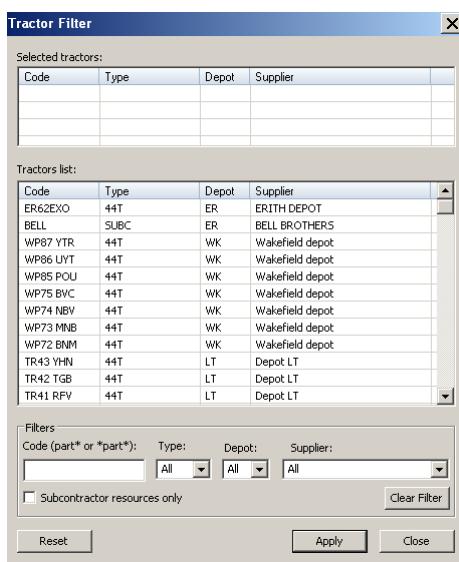


Figure 151

- Tractor List**, Select the Tractors from the List (Use Ctrl & Click to select and de-select tractors) If required, Use the Filter at the bottom of the window to filter out the list to display tractors that belong to a specific depot or Supplier

- Click Apply

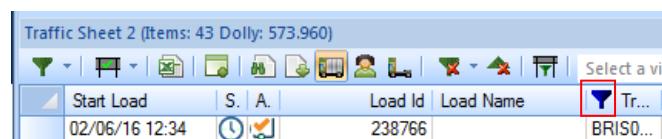


Figure 152

Loads that have been allocated to the vehicles selected will be displayed

Driver Filter Search

From the Traffic Sheet

1. Click 

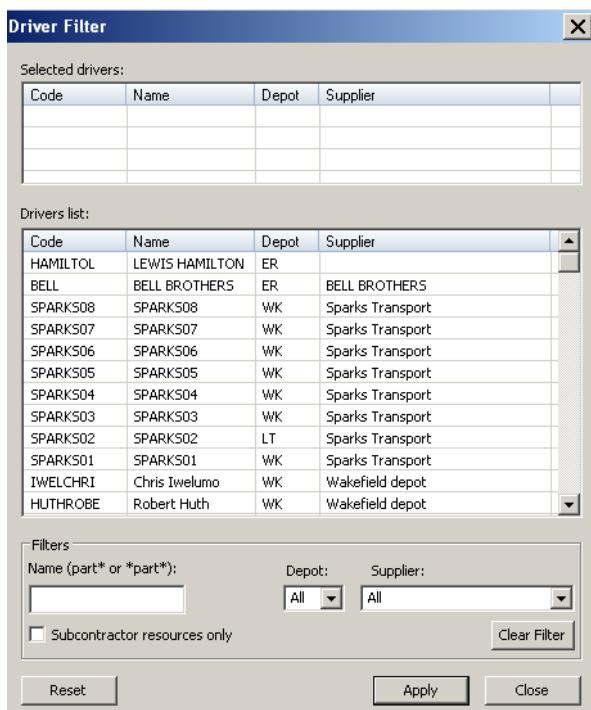


Figure 153

2. **Driver List**, Select the Drivers from the List (Use Ctrl & Click to select and de-select drivers) If required, Use the Filter at the bottom of the window to filter out the list to display drivers that belong to a specific depot or Supplier
3. Click **Apply**

Loads that have been allocated to the drivers selected will be displayed

Trailer Filter Search

- ## 1. Click

Trailer Filter

Selected trailers:

Code	Type	Depot	Supplier
TL320	TRLR	WK	Wakefield depot

Trailers list:

Code	Type	Depot	Supplier
BELL	SUBC	ER	BELL BROTHERS
TL329	TRLR	WK	Wakefield depot
TL328	TRLR	WK	Wakefield depot
TL327	TRLR	WK	Wakefield depot
TL326	TRLR	WK	Wakefield depot
TL325	TRLR	WK	Wakefield depot
TL324	TRLR	WK	Wakefield depot
TL323	TRLR	WK	Wakefield depot
TL322	TRLR	WK	Wakefield depot
TL321	TRLR	WK	Wakefield depot
TL320	TRLR	WK	Wakefield depot
TL319	TRLR	WK	Wakefield depot

Filters

Code (part* or *part*): Type: Depot: Supplier:

Subcontractor resources only

Figure 154

30. **Trailer List**, Select the Trailers from the List (Use Ctrl & Click to select and de-select trailers)If required, Use the Filter at the bottom of the window to filter out the list to display trailers that belong to a specific depot or Supplier

- ### 31. Click Apply

Loads that have been allocated to the trailers selected will be displayed

Removing Traffic Sheet Specific Filters

From the Traffic Sheet:

1. Click the relevant button  (Tractor, Driver or Trailer)
 2. Click Clear Filter
 3. Click the Apply button

View Other Depots Jobs

The View other depots jobs function is available to users in ESP if access has been granted to the user in ESP admin. This function allows users to search and view jobs for depots within the same division they are not logged in to or don't have full access to.

Access View other depots Jobs

From the tools option on the menu:

1. Select View Other depots jobs
2. Select the depot, Status, Date Range and Commodity values to search on
3. Click Apply
4. Jobs found that match the criteria will be displayed in the window

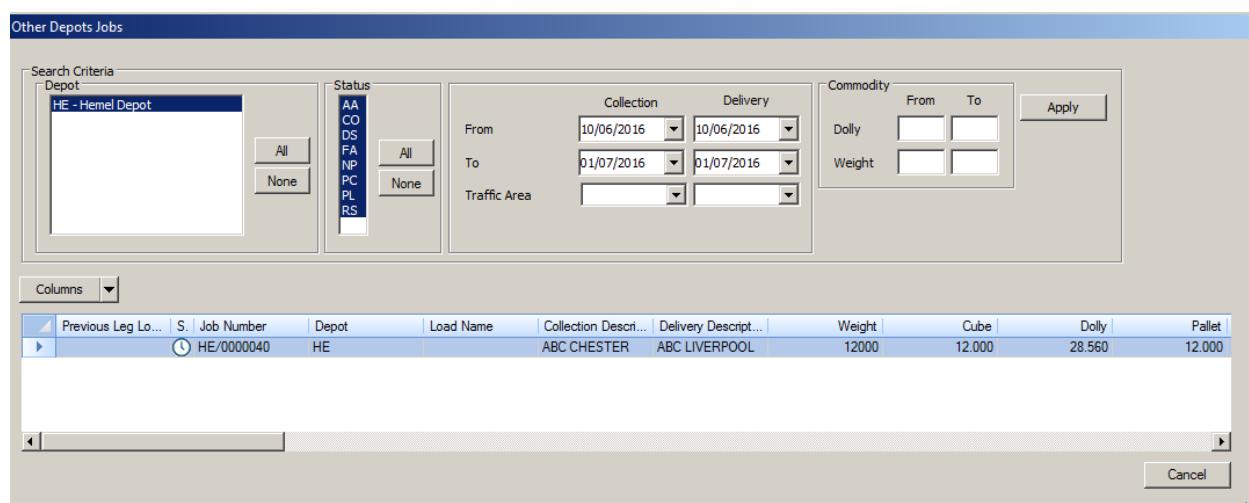


Figure 155

Note: The jobs displayed cannot be changed from this window, the user will have to be given the relevant access or login to the relevant depot to change or plan the jobs.

Pink Routes

In addition if the option is enabled in ESP Admin, other depots jobs are highlighted in Pink in the order pool and traffic sheet:

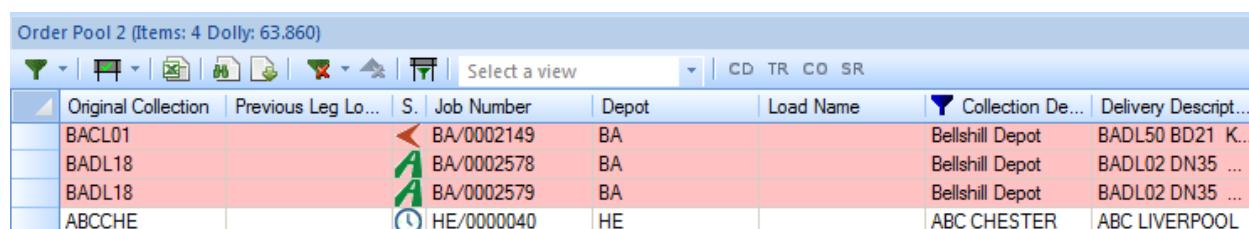


Figure 156

Invoicing and Load Restrictions

When loads contain Invoiced Jobs or Rate Confirmed Legs certain restrictions apply.

Invoicing:

Job Status		Invoice Column
IN	Job cannot be removed from the Load New Stops cannot be added to the Load. New Jobs with Matching Stops can be added to the Load	Green Tick (Load is Locked at Stop Level)
AU	Job cannot be removed from the Load (Job can be unauthorised if required)	Amber Tick
CO	Job leg can be removed from the load (providing one job is left on the load to maintain the route integrity for the load)	

Rate Confirm (Supplier Payment)

Haulage Status		Rate Confirmed Column
RC	The Load has been Rate Confirmed (Supplier Paid) new jobs cannot be added or removed from the load (Load is Locked)	Green Tick
	The Job has a leg that has been Rate Confirmed (Supplier Paid) The Job leg can be removed from the load (with the existing route intact) and added to another load providing the stops match. The exception to this is if this is the final delivery leg, the route can be manipulated if this is the case	Amber Tick

Add & Change Tractors, Drivers & Trailers (GTS)

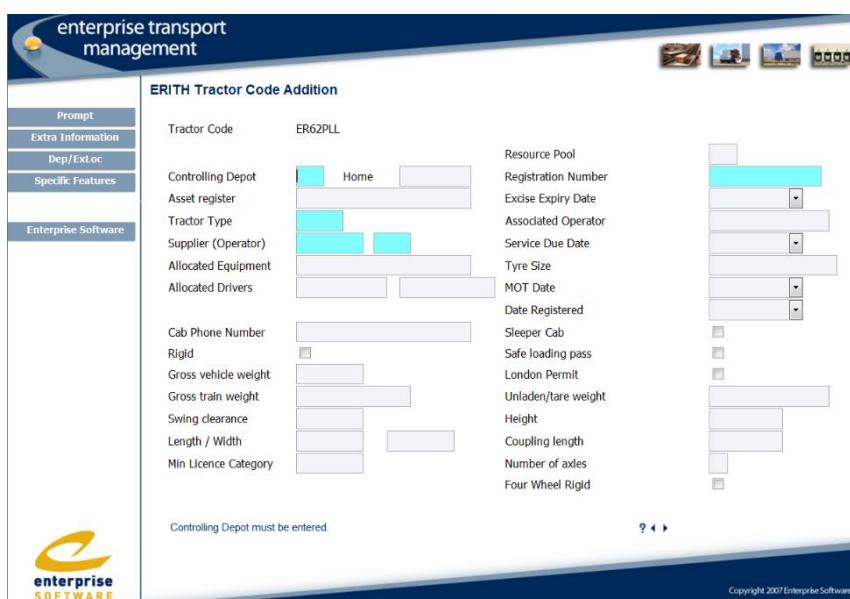
Resources in ESP (Tractors, Drivers and Trailers) are created and maintained in GTS. Details of the resources are sent to ESP.

Tractor Maintenance

From the GTS Menu, Select the **Tractor Maintenance** option:

1. Click **Add**
2. **Tractor Code**, Key in a Tractor Code (maximum 8 characters)
3. Press **Enter**

The Tractor Code Addition Screen is displayed:



The screenshot shows the 'ERITH Tractor Code Addition' screen. On the left is a vertical menu with options: Prompt, Extra Information, Dep/ExLoc, Specific Features, and Enterprise Software (which is selected). The main area has two columns of input fields. The left column includes: Tractor Code (ER62PLL), Controlling Depot (Home), Asset register, Tractor Type, Supplier (Operator), Allocated Equipment, Allocated Drivers, Cab Phone Number, Rigid, Gross vehicle weight, Gross train weight, Swing clearance, Length / Width, and Min Licence Category. The right column includes: Resource Pool, Registration Number, Excise Expiry Date, Associated Operator, Service Due Date, Tyre Size, MOT Date, Date Registered, Sleeper Cab, Safe loading pass, London Permit, Unladen/tare weight, Height, Coupling length, Number of axles, and Four Wheel Rigid. At the bottom left is a note: 'Controlling Depot must be entered.' and at the bottom right is the copyright information: 'Copyright 2007 EnterpriseSoftware'.

Figure 157

4. Key in the following mandatory* fields on the Tractor Code Addition Screen:

Controlling Depot	Key in the Depot Code that owns the vehicle (F4 Master File Prompt available)
Registration Number	Key in the Registration Number of the vehicle
Tractor Type	Key in the Tractor Type (F4 Master File Prompt available)
Supplier (Not Mandatory but should be completed)	Key in the Supplier Code – this is the depot or supplier that owns the vehicle (F4 Master File Prompt available)

* There may be more mandatory fields e.g. if the resources being added are tracked.

5. Key in any further information that is required for the vehicle
6. Press Enter to Save the Tractor Details

The Tractor will now be downloaded to ESP and available to Resource once the download has completed.

Rigids

There are two flags on the tractor master file, Rigid and 4 Wheel Rigid. Vehicles can be flagged as either but not both. Once selected the following validation occurs in ESP:

Vehicles setup as 4 Wheel Rigids: When this type of vehicle is allocated to a load a trailer cannot be allocated, instead ESP displays 'RIGID' in the trailer field. The load can then be despatched as required without having to allocate a trailer.

Vehicles setup as Rigids: Loads can be despatched with or without a trailer. However only Trailers that are setup as Rigid Trailers can be allocated to Vehicles setup as Rigids. Standard Trailers cannot be allocated to Rigid Vehicles.

Searching for a Tractor

The tractor list displays tractors for the current depot. To see all tractors for all depots, click **All Tractors**

From the Tractor Code Selection Screen

Search by Tractor Code:

1. Key in a 1 in the Action Column
2. Key in all or the start of the Tractor Code in the Code Field

View By **Code** MOT Date Service Date

Action	Code	Type	Active
1	LD		
	FW68 ZXC	44T	YES
	FW69 XCV	44T	YES

Figure 158

3. Press Enter to display the Tractors that match the search

View By **Code** MOT Date Service Date

Action	Code	Type	Active
	LD92 WSX	44T	YES
	LD93 EDC	44T	YES
	LD94 RFV	44T	YES
	LD95 TGB	44T	YES
	LD96 YHN	44T	YES
	LD97 UJM	44T	YES
	LD98 IKL	44T	YES
	LD99 PLM	44T	YES
	WP72 BNM	44T	YES
	WP73 MNB	44T	YES

Figure 159

Clear the Search and Reposition the list back to the top

1. Key 1 in the Action Column
2. Press Enter

Equipment Maintenance (Trailers)

From the GTS Menu, Select the **Equipment Code Maintenance** Option:

1. Click **Add**
2. **Trailer Code**, Key in a Trailer Code (maximum 15 characters)
3. Press Enter

The Equipment Code Addition Screen is displayed:



The screenshot shows the 'Equipment Code' addition screen. At the top, the 'Equipment Code' field contains 'T123'. Below it, there are several input fields and dropdown menus. Some fields have F4 master file prompts indicated by small blue squares. The fields include:

- Supplier Code (dropdown)
- Service Due Date (dropdown)
- Tacho (checkbox)
- Equipment Type (dropdown, currently selected)
- Equipment Element (dropdown, currently selected)
- Allocated Tractor (dropdown)
- MOT Date (dropdown)
- Rigid (checkbox)
- Sum of Axle Weights (dropdown)
- Swing clearance (dropdown)
- Length (dropdown)
- Width (dropdown)
- Compartments (dropdown)
- Capacities 1) (dropdown)
- 4) (dropdown)
- 5) (dropdown)
- 8) (dropdown)
- 9) (dropdown)
- TOTAL (checkbox)
- Resource Pool (checkbox)
- Controlling Depot (checkbox, highlighted in blue)
- Asset Register (checkbox)
- Tyre Size (checkbox)
- Date Registered (dropdown)
- On Hire (checkbox)
- Sideguards (checkbox)
- Safe loading pass (checkbox)
- Unladen/tare weight (dropdown)
- Height (dropdown)
- Coupling length (dropdown)
- Number of axes (dropdown)
- Associated Operator (dropdown)
- Isotrik (checkbox)

A status message at the bottom left says 'Controlling Depot must be entered.'

Figure 160

4. Key in the following mandatory* fields on the Equipment Code Addition Screen:

Equipment Type	Key in the Equipment Type Code for the Trailer (F4 Master File Prompt available)
Equipment Element	Key in the Equipment Element (T – Trailer is normally entered in this field)
Controlling Depot	Key in the Controlling Depot for the Trailer (F4 Master File Prompt available)
Supplier (Not Mandatory but can be completed)	Key in the Supplier Code – this is the depot that owns the Trailer (F4 Master File Prompt available)

* There may be more mandatory fields e.g. if the resources being added are tracked.

5. Key in any further information that is required for the Trailer
6. Press Enter to Save the Trailer Details
7. Press Enter to Save the Trailer Details

The Trailer will now be downloaded to ESP and available to Resource once the download has completed.

Rigids

The Rigid flag on the equipment master file enables the following validation when resourcing loads in ESP.

Trailers that are setup as Rigid Trailers can be allocated to Vehicles setup as Rigids. Standard Trailers cannot be allocated to Rigid Vehicles.

Searching for a Trailer

The Equipment list displays Trailers for the current depot. To see all trailers for all depots, click **All Equipment**

From the Equipment(Trailer) Code Selection Screen

Search by Trailer Code:

1. Key in a 1 in the Action Column
2. Key in all or the start of the Trailer Code in the Code Field

View By **Code** MOT Date Service Date

Action	Code	Type	Active
1	TL4		
	TL300	TRL	YES
	TL301	TRL	YES

3. Press Enter

Clear the Search and Reposition the list back to the top

1. Key **1** in the Action Column
2. Press **Enter**

Driver Maintenance

From the GTS Menu, Select the **Driver Maintenance** Option:

1. Click **Add**
2. Driver Code, Key in a Driver Code (maximum 8 characters)
3. Press Enter

The Driver Code Addition Screen is displayed:

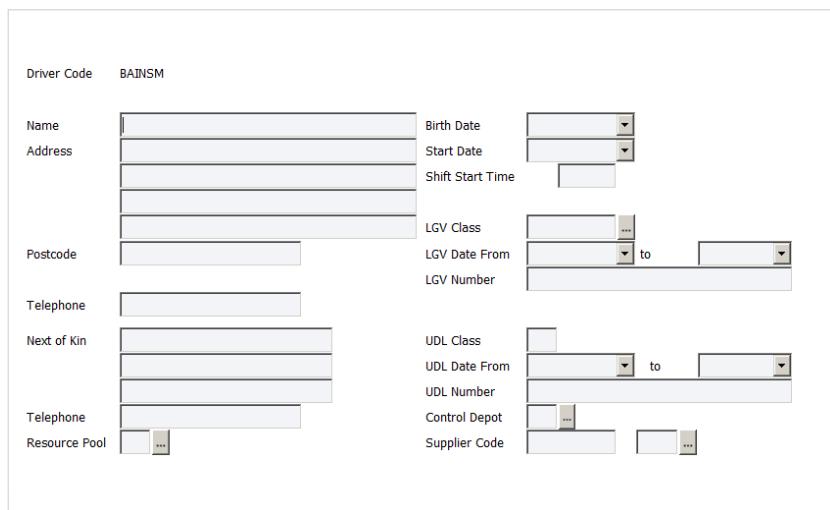


Figure 161

4. Key in the following mandatory fields on the Driver Code Addition Screen:

Name	Key in the Name of the Driver
Controlling Depot	Key in the Controlling Depot for the Driver (F4 Master File Prompt available)
Supplier	Key in the Supplier Code – this is the depot that the Driver Works for (F4 Master File Prompt available)

5. Key in any further information that is required for the Driver

6. Press Enter to Save the Driver Details

The Driver will now be downloaded to ESP and available to Resource once the download has completed.

Searching for a Driver

The Driver list displays drivers for the current depot. To see all drivers for all depots, click **All Drivers**

From the Driver Code Selection Screen

Search by Driver Code:

1. Key in a 1 in the Action Column
2. Key in all or the start of the Driver Code in the Code Field

Action	Code	Name
1	HEAT	
	FOLESTEV	Steve Foley

Figure 162

3. Press Enter to find the Driver

Action	Code	Name
	HEATADRI	Adrian Heath
	HEATPHIL	Phil Heath
	HEMMCHRI	Chris Hemming
	HENRKARL	Karl Henry
	HERODENN	Dennis Herod
	HIGGDANN	Danny Higginbotham
	HIGGSAM	Sam Higginson
	HOLFTOM	Tom Holford
	HOWIBOBB	Bobby Howitt
	HUDSALAN	Alan Hudson
	HURSGEOF	Geoff Hurst

Figure 163

Search by Driver Name:

1. **Name** Field, Key in **Part or All** of a Driver Name
2. Press **Enter** to Find the driver

Action	Code	Name
		JOH
	FARMJOHN	John Farmer
	JOHNJOE	Joe Johnson
	KINGJOHN	Johnny King

To Clear the Search Filter:

1. Delete the **Code** or **Name** from the relevant field
2. Key **1** in the Action Column

Action	Code	Name
1		
	EVANRAY	Ray Evans

3. Press Enter

Dormant and Live

Tractors can be made dormant or Inactive. Both of these functions remove visibility of the vehicle from ESP. Trailers and Drivers can be made dormant. This function removes visibility of the driver/trailer from ESP.

Deactivate a Tractor

1. Find the tractor in the tractor master file list
2. Right click on the tractor
3. Select Action Code 7 – **Deactivate**
 - The Tractor will still be visible in GTS but the **Active** status will be No
 - The Tractor will no longer be visible in ESP

Make a Tractor Active

1. Find the Tractor in the Tractor Master file list
2. Right click on the Tractor
3. Select Action Code 6 – Activate
 - The Tractor will still be visible in GTS and the active status will be Yes
 - The Tractor will now be visible in ESP

Move a Tractor/Trailer or Driver to Dormant

1. Find the Tractor/Trailer or Driver in the master file list
2. Right click on the resource
3. Select action code 8 – Move to Dormant
4. The Tractor/Trailer/Driver will now be moved to the dormant list in GTS
 - The Tractor/Trailer/Driver will no longer be visible in ESP

Move a Tractor/Trailer or Driver from Dormant to Live

From the relevant Master file (Tractor/Equipment/Trailer)/Driver

1. Click **Dormant Tractors** or **Dormant Drivers** or **Dormant Equipment**
2. Right Click on the Tractor/Trailer or Driver
3. Select Action Code **8 – Move to Live**
 - The Tractor/Trailer/Driver will now be visible in ESP

Unavailability

Unavailability can be entered for resources in GTS. Entering a period of unavailability makes the resource unavailable for planning during the timescale entered.

Make a Tractor/Trailer or Driver unavailable

1. Find the Tractor/Trailer or Driver in the master file list
2. Right click on the Resource Name
3. Select action code **9 – Unavailability**
4. **From Date**, Key in the start date of the unavailability (GTS Dates are in numerical format - ddyyymm – 010613 represents the 1st June 2013)
5. **Time**, Key in the start time of the unavailability (GTS times are in numerical format - hhmm – 2300 represents 23hrs 00 minutes)
6. **To Date**, Key in the end Date of the unavailability
7. **Time**, key in the end Time of the unavailability

-
8. **Reason**, key in the Reason for the unavailability e.g. service/mot
 9. Press **Enter**
 10. Click **Confirm**

Note: Unavailability can only be entered for future dates/times.

Create Supplier Resources

Supplier resource for ESP needs to be created in GTS. Once the relevant master files have been populated the supplier bin combination is automatically setup in ESP, loads can then be allocated to suppliers.

Auto Create Default Supplier Bin Resources

From the GTS Menu

1. Select the Supplier Master File option, Click Add to add in a new supplier code
2. **Supplier Code**, Key in the Supplier Code and Press Enter



The screenshot shows the 'Supplier Code Addition' screen. The 'Supplier Code' field is filled with 'MASON'. Other fields like 'Name' and 'Address' are empty. The 'Purchase a/c' field is also highlighted in blue. Various checkboxes and dropdowns are present throughout the form.

Figure 164

3. Complete the mandatory fields (highlighted in blue above) Note - purchase a/c may not be mandatory.
4. Press **Enter** to save the supplier record

Once the supplier code has been keyed in the Auto create default resources window is displayed:

Barnsley Depot Auto Create Default Resources

Action	Depot	Description	Defaults Exist
X	BA	Barnsley Depot DIV A	
X	BE	Bedworth Depot	
X	BH	Bellshill Depot DIV B	
X	BR	Bristol Depot DIV A	
X	BT	Barton Depot	
X	BW	Boundary Way Depot	
X	B2	Barnsley Depot	
X	B3	Barnsley Depot DIV A	
X	B4	Barnsley Depot DIV A	
X	CA	Carlisle Depot	
X	CR	Crews Depot	
X	CU	Cumbernauld Depot	
X	EL	Ellington Depot	
X	EN	Enfield Depot	

Supplier: MASON
Auto Create Resources For This Supplier?

Reserved Code: **MASON**

GTS: LEADING THE WAY IN LOGISTICS SOLUTIONS GTS: ORDER LIFE CYCLE MANAGEMENT GTS: TRANSPORT MANAGEMENT

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Figure 165

5. Key **X** by the side of each depot to ensure the supplier is available in each of the depots
6. Press **Enter** to Save the changes
7. Click **Confirm**

The resources for the supplier (Tractor/Driver and Trailer will have been created in the associated depots)

Barnsley Depot Tractor Code Update

Tractor Code	MASONBA	ACTIVE
Controlling Depot	BA	Resource Pool
Asset register	MASONBA	Registration Number
Tractor Type	SUBC	Excise Expiry Date
Supplier (Operator)	MASON	Associated Operator
Allocated Equipment	MASONBA	Service Due Date
Allocated Drivers	MASONBA	Tyre Size
Cab Phone Number		MOT Date
Cab Speed Dial No		Date Registered
Number of axles		Sleeper Cab
Gross vehicle weight		London Permit
Gross train weight		Unladen/tare weight
Swing clearance		Height
Length / Width		Coupling length
Min Licence Category		Rigid
		Four Wheel Rigid

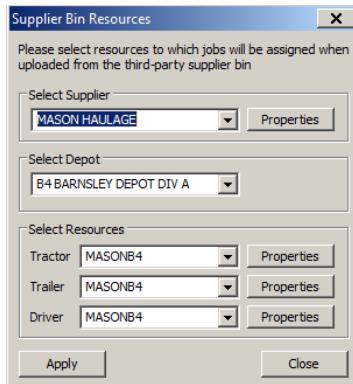
GTS: LEADING THE WAY IN LOGISTICS SOLUTIONS GTS: ORDER LIFE CYCLE MANAGEMENT GTS: TRANSPORT MANAGEMENT

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Figure 166

Supplier Bin combinations

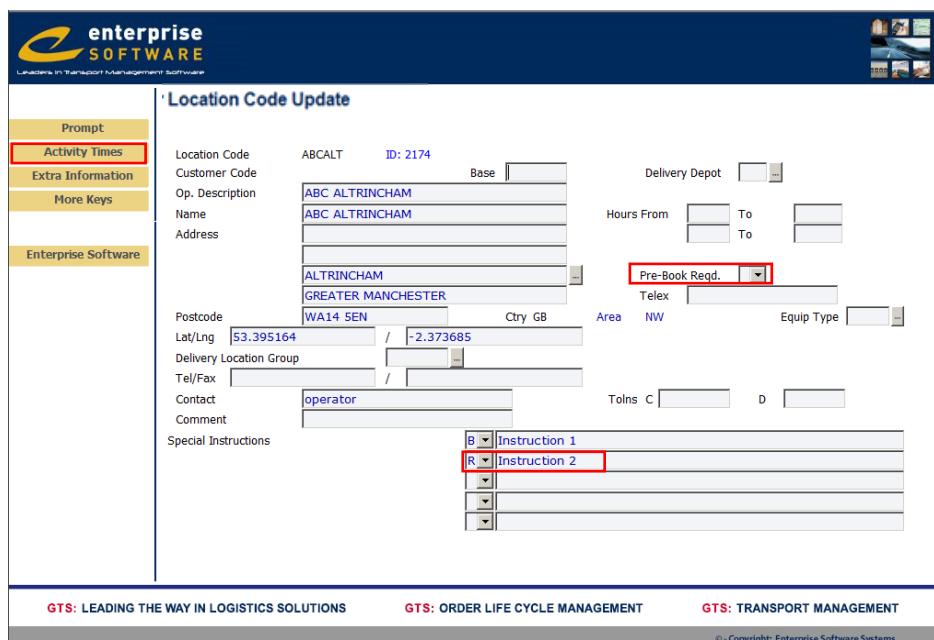
The following setup will also have been completed in ESP for each depot, this will only be visible to a user with Administrative Rights:



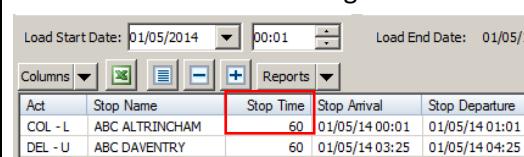
GTS Settings & ESP

The GTS Location code master file holds the details for collection and delivery locations for jobs. This master file also controls whether orders have a booking in requirement for collection or delivery. Activity times can also be setup against a location. These times are used to calculate stop times and load/unload times in ESP.

GTS Location Code Master File



This screenshot shows the 'Location Code Update' screen in the GTS application. The left sidebar has a 'Prompt' section with 'Activity Times' highlighted in red. The main form displays location details like Location Code (ABCALT), Customer Code (ID: 2174), and Address (ALTRINCHAM, GREATER MANCHESTER, WA14 5EN). It also shows coordinates (Lat/Lng: 53.395164, -2.373685) and delivery information (Delivery Depot, Hours From/To, Pre-Book Reqd., Telex, Area, Equip Type). The 'Special Instructions' section contains two entries: 'B Instruction 1' and 'R Instruction 2', both highlighted with red boxes. At the bottom, there are three footer links: 'GTS: LEADING THE WAY IN LOGISTICS SOLUTIONS', 'GTS: ORDER LIFE CYCLE MANAGEMENT', and 'GTS: TRANSPORT MANAGEMENT'. A copyright notice at the bottom right reads '© - Copyright: Enterprise Software Systems'.

Function	GTS Settings	Impact in ESP																
Pre-Book Rqd. <input type="checkbox"/>	<p>Sets booking in requirements for an order:</p> <p>Blank – not required</p> <p>C – Collection Booking in required</p> <p>D – Delivery Booking in required</p> <p>B – Both Collection and Delivery Booking in required</p>	<p>From the Order Pool or Load Manager Prebook flags are visible:</p> <p>Sets a Collection Prebook flag (triggers an Alert)</p> <p>Sets a Delivery Prebook flag (triggers an Alert)</p> <p>Sets Collection & Delivery Prebook flag (Alert)</p> <p>The Orders must be booked in to clear the Alert (icon will change colour to green) Alternatively the Alert can be Accepted. See the Alerts section for more details</p>																
Activity Times	<table border="1"> <tr> <td>Preparation Time</td> <td>0 (Mins)</td> </tr> <tr> <td>Load Base Time</td> <td>60 (Mins)</td> </tr> <tr> <td>Load Increment Time</td> <td>0 (Mins)</td> </tr> <tr> <td>Pickup Time</td> <td>0 (Mins)</td> </tr> <tr> <td>Clean up Time</td> <td>0 (Mins)</td> </tr> <tr> <td>Unload Time</td> <td>0 (Mins)</td> </tr> <tr> <td>Unload Increment</td> <td>0 (Mins)</td> </tr> <tr> <td>Drop Time</td> <td>0 (Mins)</td> </tr> </table> <p>Unload Time Pickup Time Drop Time</p> <p>Note: Increments can also be set for each units load and unload increment time, this will also be included in the stop time if set.</p>	Preparation Time	0 (Mins)	Load Base Time	60 (Mins)	Load Increment Time	0 (Mins)	Pickup Time	0 (Mins)	Clean up Time	0 (Mins)	Unload Time	0 (Mins)	Unload Increment	0 (Mins)	Drop Time	0 (Mins)	<p>Visible from the Load Manager Window:</p>  <p>Stop Load Time Stop Unload Time Stop Pickup Time Stop Drop Off Time</p> <p>Note: Stop Times are also visible on the Gantt Chart and from Job Properties.</p>
Preparation Time	0 (Mins)																	
Load Base Time	60 (Mins)																	
Load Increment Time	0 (Mins)																	
Pickup Time	0 (Mins)																	
Clean up Time	0 (Mins)																	
Unload Time	0 (Mins)																	
Unload Increment	0 (Mins)																	
Drop Time	0 (Mins)																	

Special Instructions	<p>R <input type="checkbox"/> Instruction 2</p> <p>Select Action Code R (Drivers Roadnote) Instructions keyed in will be visible in ESP as a Special instruction that can also be displayed Drivers Paperwork if required.</p>	<p>Order Pool 1 (Items: 38 Dolly: 683.160)</p>  <p>Special instruction indicator visible in the Order Pool, Traffic Sheet, Load Manager or Gantt Chart Instruction Details are also visible in the Job Properties window.</p>

GTS Settings for Major and Minor Alerts

The settings for Major and Minor alerts are set in the following places in GTS:

Note: Special Requirements and Special Features have master file entries in their own right. These master files can be accessed in GTS.

Special Requirements:

Customer Master File

Holds details of special requirements, when an order is raised for the customer details of the special requirement will default onto the order.

Location Master File

Holds details of special requirements, when an order is raised Collecting or Delivering to the Location details of the special requirement will default onto the order.

Commodity Master File

Holds details of special requirements, when an order is raised for the commodity, details of the special requirement will default onto the order.

Once a load is created in ESP the special requirements required for the job will be cross checked against the details in the following master files:

GTS Job

Jobs raised for customers, locations or commodities that have requirements will include those requirements. Requirements for a job can be reviewed or changed from within the job details screen (customer enquiry)

Special Features:

Tractor Type Master File

Holds details of the Capacity for the Vehicle that the order is going to be allocated to

Equipment Type

Holds details of the Capacity for the Trailer that the order is going to be allocated to

Driver Master File

Holds details of Features/Qualifications/Licences that the Driver must have to transport the order

Tractor Master File

Holds details of Features/Qualifications/Licence Category that the Vehicle must have to transport the order –

Note: Licence Category is used when a Driver is allocated to the vehicle, if the driver doesn't have the correct Licence to drive the vehicle an alert will be triggered.

Equipment (Trailer) Master File

Holds details of Features the trailer must have, to transport the order.

Special Requirements settings GTS

Customer Master File

Locate and Update the Customer in the Customer Master file:

1. Click on **Requirements**

The Customer Special Features/Requirement window is displayed



Equip/Trac/Driver	Special Req/ment	Description	Accept Alert	Include/Exclude	Pass Code
E	LIVERY	Tesco Livery	N	I	

Figure 167

2. **Equip/Trac/Driver field**, Key in either E, T or D to indicate which resource this requirement will apply to
3. **Special Requirements field**, Key in the Special Requirement that the resource should have (F4 Master File prompt available)
4. **Description**, this will default in from the Special Requirement
5. **Accept Alert**, Key in either Y or N (Yes indicates that this is a Major Alert, N indicates that this is a Minor Alert)
6. **Include/Exclude**, Key in either I or E (include will ensure that this is included on jobs, E can be used to exclude the requirement at this stage, this flag can be changed to I to include at any point)
7. **Pass Code**, Key in a Pass Code if required (not mandatory)
8. Add more entries if required on separate lines
9. Click **Update** to save the changes

Note: To delete entries, highlight the text in the line and press the delete key, alternatively click Delete All from the Navigation bar on the left hand side of the screen to delete all entries.

Location Master File

Locate and Update the Location in the Location Master file:

1. Click on **Requirements**

The Location Special Features/Requirement window is displayed



E/T/D	Code	Description	Accept Alert	Include/Exclude	Pass
T	LIVERY	Tesco Livery	N	I	

Figure 168

2. **Equip/Trac/Driver field**, Key in either E, T or D to indicate which resource this requirement will apply to
3. **Special Requirements field**, Key in the Special Requirement that the resource should have (F4 Master File prompt available)
4. **Description**, this will default in from the Special Requirement
5. **Accept Alert**, Key in either Y or N (Yes indicates that this is a Major Alert, N indicates that this is a Minor Alert)
6. **Include/Exclude**, Key in either I or E (include will ensure that this is included on jobs, E can be used to exclude the requirement at this stage, this flag can be changed to I to include at any point)
7. **Pass Code**, Key in a Pass Code if required (not mandatory)
8. Add more entries if required on separate lines
9. Click **Update** to save the changes

Note: To delete entries, highlight the text in the line and press the delete key, alternatively click Delete All from the Navigation bar on the left hand side of the screen to delete all entries.

Commodity Master File

Locate and Update the Customer in the Customer Master file:

1. Click on **Requirements**

The Commodity Special Features/Requirement window is displayed



E/T/D	Code	Description	Accept Alert	Include/Exclude	Pass
D	EU	EUROPEAN DRIVER	N	I	Pass

Figure 169

2. **ETD Field (Equip/Trac/Driver)**, Key in either E, T or D to indicate which resource this requirement will apply to
3. **Special Requirements Code field**, Key in the Special Requirement that the resource should have (F4 Master File prompt available)
4. **Description**, this will default in from the Special Requirement
5. **Accept Alert**, Key in either Y or N (Yes indicates that this is a Major Alert, N indicates that this is a Minor Alert)
6. **Include/Exclude**, Key in either I or E (include will ensure that this is included on jobs, E can be used to exclude the requirement at this stage, this flag can be changed to I to include at any point)
7. **Pass Code**, Key in a Pass Code if required (not mandatory)
8. Add more entries if required on separate lines
9. Click **Update** to save the changes

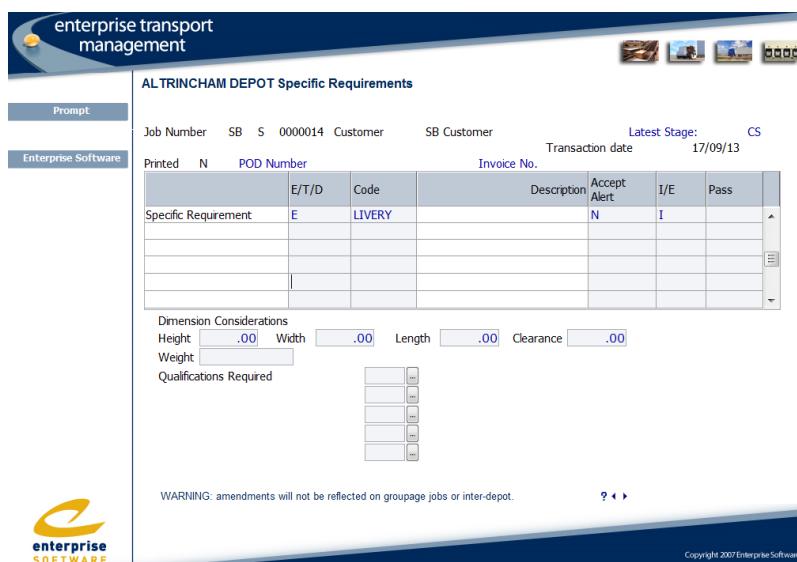
Note, To delete entries, highlight the text in the line and press the delete key, alternatively click Delete All from the Navigation bar on the left hand side of the screen to delete all entries.

GTS Job Requirements

Jobs raised with customers, locations or commodities that include special requirements will include the requirements. Requirements are visible from Job Details in GTS and also via Job Properties in ESP:

From Customer Enquiry,

1. Locate the Job
2. Key Action Code **J** to access job details
3. Click **More Keys** until the SpecialRequirements function button is visible
4. Click **Special Requirements**



The screenshot shows the 'ALTRINCHAM DEPOT Specific Requirements' screen. At the top, it displays the job number (SB S 0000014), customer information, and transaction date (17/09/13). Below this is a table for entering specific requirements, with columns for Description, Accept Alert, I/E, and Pass. There are also fields for dimension considerations (Height, Width, Length, Clearance) and qualifications required.

Figure 170

Special requirements for the job will be displayed, the requirements can be changed, removed and more requirements can also be added on this screen

E/T/D	Code	Accept Alert	I/E	Pass	Qualifications
Equipment(Trailer) Tractor or Driver	The Special Requirement Master File Code (F4 Prompt available)	Y(Yes)/N(No)	I – Include E- Exclude	Pass Code for Hazardous products	Driver Qualifications required for the job
This is the resource the requirement is for		Yes means the alert can be accepted. No indicates a Major alert that cannot be accepted in ESP	Include or Exclude the requirement for the job		

Special Features and Licence Categories GTS

Tractor Master File

Locate and Update the Tractor in the Tractor Master file:

1. Click on **Specific Features**

The *Special Features/Requirement window is displayed*



Figure 171

2. **Type Field**, Key in the Special Feature that the resource should have (F4 Master File prompt available)
3. **Description**, Pass Code, Level will default in from the Special Feature
4. Add more entries if required on separate lines
5. Click **Update** to save the changes

Note: To delete entries, highlight the text in the line and press the delete key, alternatively click Delete All from the Navigation bar on the left hand side of the screen to delete all entries.

Tractor Master File - Min Licence Category

Locate and Update the Tractor in the Tractor Master file:

1. Min Licence Category Field, Key in the licence category (F4 Master File prompt available)
2. Press **Enter** to save the details in the Tractor Master file

Equipment Master File

Locate and Update the Equipment Code in the Equipment Master file:

1. Click on **Specific Features**

The Special Features/Requirement window is displayed



The screenshot shows the 'ERITH Specific Features Maintenance' window. On the left, there's a vertical navigation bar with buttons for Help, Prompt, Update, and Delete All, and a 'Enterprise Software' section. The main area displays the equipment code 'TL101'. Below it is a table with columns: Type, Description, Pass Code, and Level. Two entries are listed: 'TAIL' (Description: Tail Lift, Pass Code: Y, Level: 1) and 'TLIFT' (Description: TAIL LIFT, Pass Code: Y, Level: 1). There are also four small icons at the top right of the main window.

Type	Description	Pass Code	Level
TAIL	Tail Lift	Y	1
TLIFT	TAIL LIFT	Y	1

Figure 172

2. **Type Field**, Key in the Special Feature that the resource should have (F4 Master File prompt available)
3. **Description**, Pass Code, Level will default in from the Special Feature
4. Add more entries if required on separate lines
5. Click **Update** to save the changes

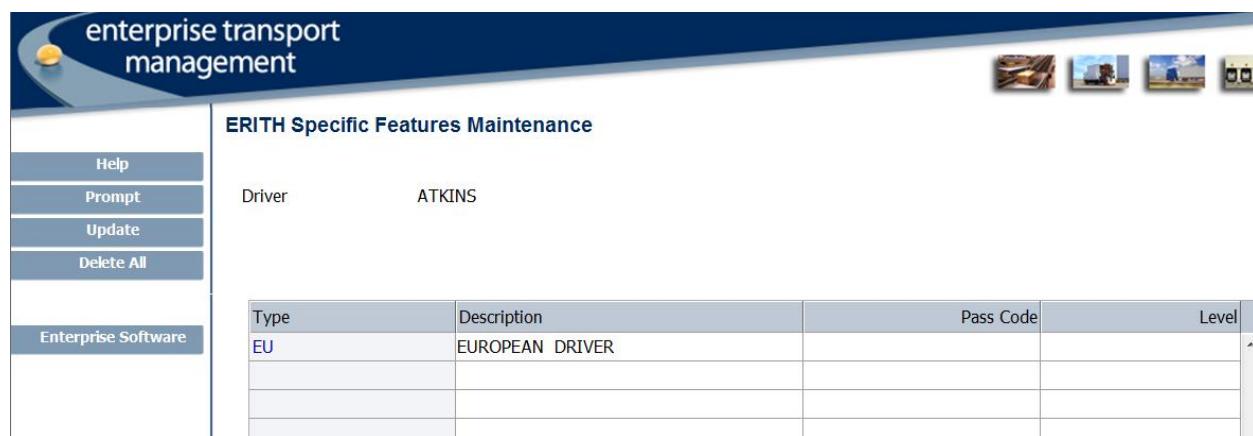
Note: To delete entries, highlight the text in the line and press the delete key, alternatively click Delete All from the Navigation bar on the left hand side of the screen to delete all entries.

Driver Master File

Locate and Update the Driver in the Driver Master file:

1. Click on **Specific Features**

The Special Features/Requirement window is displayed



Type	Description	Pass Code	Level
EU	EUROPEAN DRIVER		

Figure 173

2. **Type Field**, Key in the Special Feature that the resource should have (F4 Master File prompt available)
3. **Description**, Pass Code, Level will default in from the Special Feature
4. Add more entries if required on separate lines
5. Click **Update** to save the changes

Note: To delete entries, highlight the text in the line and press the delete key, alternatively click Delete All from the Navigation bar on the left hand side of the screen to delete all entries.

Driver Master File – LGV Category

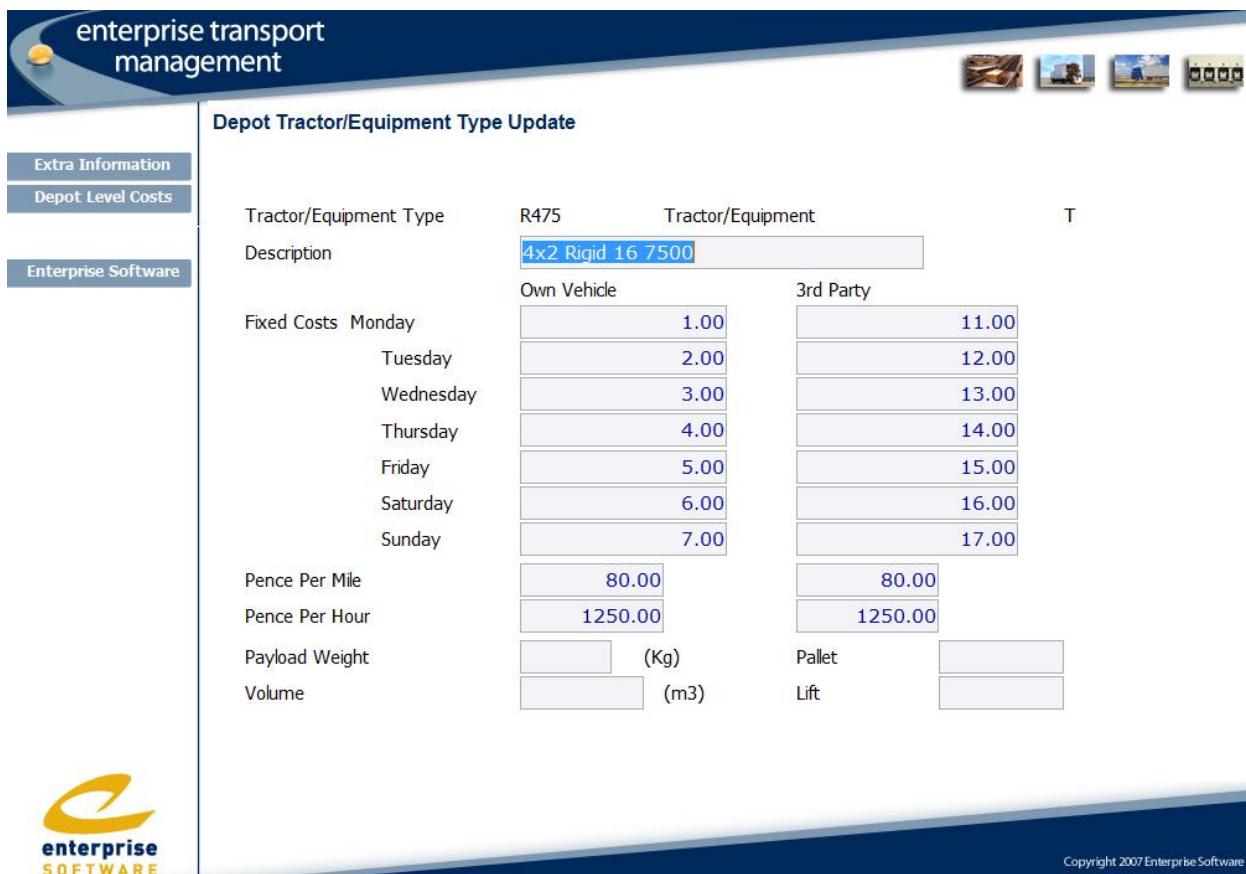
Locate and Update the Driver in the Driver Master file:

1. **LGV Category Field**, Key in the licence category (F4 Master File prompt available)
2. Press **Enter** to save the details in the Driver Master file

Fixed Costs and Running Costs GTS & ESP

The Equipment Type master file (Tractor) allows entry of daily fixed costs for each vehicle type. Fixed costs can be entered for own vehicle and 3rd party. In addition running costs (Pence per hour and pence per mile) can also be entered. If entered the combined figure (Pence per hour and pence per mile) are used to calculate the running cost for the vehicle. Figures can be entered at the top level (equipment Type level) or at Depot Level. If a depot doesn't have specific costs identified then the equipment type level costs will be used instead. Driver breaks are excluded from the calculations

GTS Equipment Type Master File



Depot Tractor/Equipment Type Update			
Tractor/Equipment Type	R475	Tractor/Equipment	T
Description	4x2 Rigid 16 7500		
	Own Vehicle	3rd Party	
Fixed Costs	Monday	1.00	11.00
	Tuesday	2.00	12.00
	Wednesday	3.00	13.00
	Thursday	4.00	14.00
	Friday	5.00	15.00
	Saturday	6.00	16.00
	Sunday	7.00	17.00
Pence Per Mile	80.00		
Pence Per Hour	1250.00		
Payload Weight	(Kg)	Pallet	
Volume	(m³)	Lift	

Figure 174

From the Equipment Type Master file:

1. Key in Action Code 3 (Update) against the Tractor Type to update
2. Press **Enter**
3. Key in **fixed Costs** if applicable,
4. Fixed Costs Own Vehicle, Key in the costs for each field Monday through to Sunday
5. **Fixed Costs 3rd Party**, Key in the costs for each field Monday through to Sunday
6. **Pence Per Mile own Vehicle**, Key in the pence per mile
7. **Pence Per Mile 3rd Party**, Key in the pence per mile
8. **Pence Per Hour own Vehicle**, Key in the pence per hour

9. **Pence Per Hour 3rd Party**, Key in the pence per hour

10. **Press Enter (To save the changes)**

To add Depot Level Entries

11. **From the Tractor/Equipment Type Update Screen**

12. Click **Depot Level Costs**

13. Select the relevant Depot code from the list

The Depot Tractor/Equipment Type Costs screen is displayed:

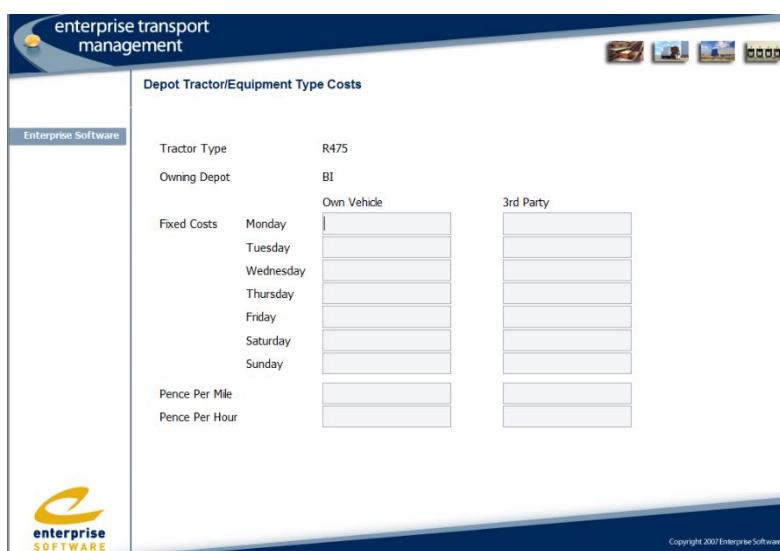


Figure 175

14. **Fixed Costs**, Key in values for the relevant days of the week for own vehicle and 3rd Party

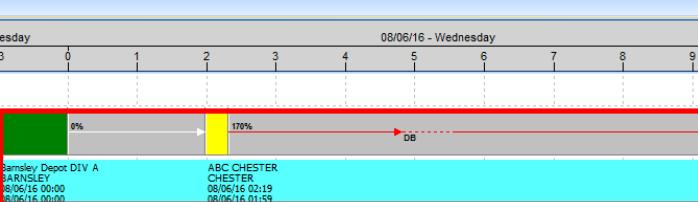
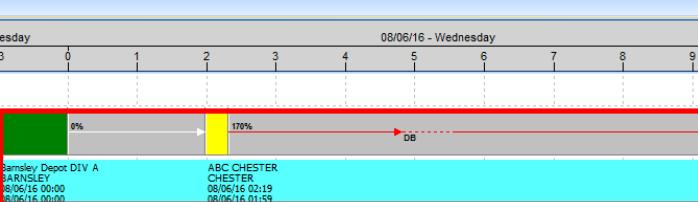
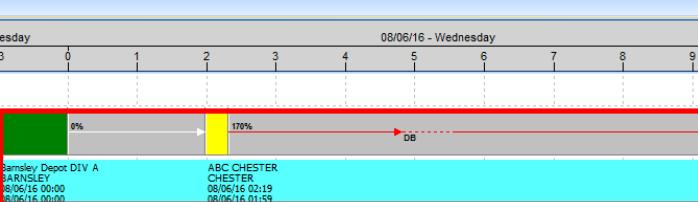
15. **Pence per Mile**, Key in values for the pence per mile for own vehicle or third party

16. **Pence per hour, Key in values for own vehicle and 3rd Party**

17. **Press Enter** to save the changes

The values will be visible in ESP and are used to calculate fixed and running costs for the vehicle.

Fixed Costs on the Traffic Sheet				
Traffic Sheet 2 (Items: 43 Dolly: 597.360)				
<input type="button" value="T"/> <input type="button" value="G"/> <input type="button" value="L"/> <input type="button" value="C"/> <input type="button" value="D"/> <input type="button" value="E"/> <input type="button" value="F"/> <input type="button" value="H"/> <input type="button" value="I"/> <input type="button" value="J"/> <input type="button" value="K"/> <input type="button" value="L"/> <input type="button" value="M"/> <input type="button" value="N"/> <input type="button" value="O"/> <input type="button" value="P"/> <input type="button" value="Q"/> <input type="button" value="R"/> <input type="button" value="S"/> <input type="button" value="U"/> <input type="button" value="V"/> <input type="button" value="W"/> <input type="button" value="X"/> <input type="button" value="Y"/> <input type="button" value="Z"/>				
Fixed Cost	Start Load	S.	A.	Load Id
150.00	08/06/16 00:00	(1)		238864

Fixed Costs on the Gantt																																																																															
<table border="1"> <thead> <tr> <th colspan="2">Gantt2</th> <th colspan="8">Gantt3</th> </tr> <tr> <th colspan="2"></th> <th colspan="8">07/06/16 - Tuesday 08/06/16 - Wednesday</th> </tr> <tr> <th>22</th> <th>23</th> <th>0</th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> <th>6</th> <th>7</th> </tr> </thead> <tbody> <tr> <td colspan="2">SRTTRAC1 DEPOT BA</td> <td colspan="8">  </td> </tr> <tr> <td colspan="2">150.00</td> <td colspan="8">497.12 1750.00</td> </tr> <tr> <td colspan="2">Barnsley Depot DIV A</td> <td colspan="8">ABC CHESTER CHESTER</td> </tr> <tr> <td colspan="2">08/06/16 00:00</td> <td colspan="8">08/06/16 03:19 08/06/16 01:59</td> </tr> </tbody> </table>										Gantt2		Gantt3										07/06/16 - Tuesday 08/06/16 - Wednesday								22	23	0	1	2	3	4	5	6	7	SRTTRAC1 DEPOT BA										150.00		497.12 1750.00								Barnsley Depot DIV A		ABC CHESTER CHESTER								08/06/16 00:00		08/06/16 03:19 08/06/16 01:59							
Gantt2		Gantt3																																																																													
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Barnsley Depot DIV A		ABC CHESTER CHESTER																																																																													
08/06/16 00:00		08/06/16 03:19 08/06/16 01:59																																																																													

Visibility of Fixed Costs

If the load is spanning 2 days (Tuesday and Wednesday) using the details below, the load will pick up a Fixed cost of £203.

The fixed cost displayed on the vehicle block on the gantt is the average of the fixed costs for the week for the tractor type.

Tractor/Equipment Type	44T	Tractor/Equipment	T
Description	44 Tonne Tractor		
Fixed Costs	Monday	Own Vehicle	3rd Party
	Tuesday	100.00	201.00
	Wednesday	101.00	202.00
	Thursday	102.00	203.00
	Friday	103.00	204.00
	Saturday	104.00	205.00
	Sunday	105.00	206.00
		106.00	207.00
Pence Per Mile		75.00	75.00
Pence Per Hour		1250.00	1250.00
Payload Weight	44000 (Kg)	Pallet	44.000
Volume	(m3)	Lift	

When more than one load is allocated to the vehicle on the same day the fixed cost is apportioned across all loads based upon the amount of time the vehicle is being utilised for each load.

Visibility of Running Costs

The running costs for the load are visible on the traffic sheet and also in the load manager. Pence per mile and pence per hour are also visible on the Tractor Block on the Gantt (visibility for this is set in the Gantt options)

ESP Tools and Statistics

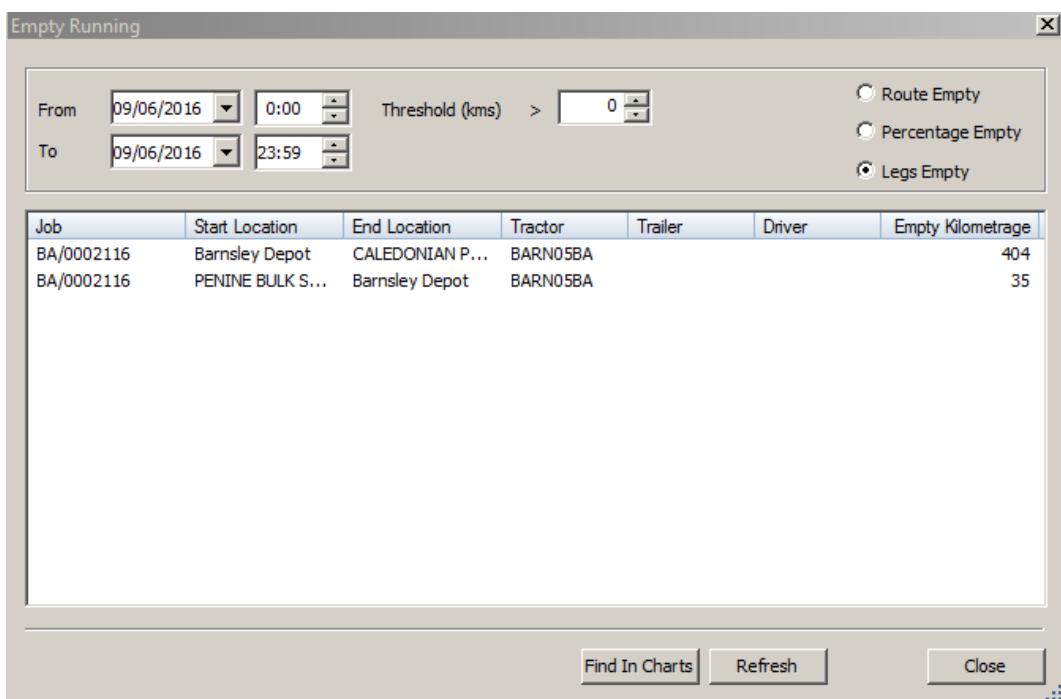
Various Tools can be used to display Statistics for Empty Running, Resource and Route Utilisation.

Empty Running

The Empty Running tool in ESP displays Vehicles that are planned on the Gantt that have empty running within a Date/Time range and within a threshold of time (minutes).

Accessing Empty Running

1. Click on the **Tools** option on the menu
2. Click **Empty Running**
3. Enter a Date/Time range and a Threshold in minutes (ESP will look for tractors that have empty running over the threshold entered)
4. Press Enter to display the loads (Figure 176)



The dialog box has the following fields:

- From: 09/06/2016, 0:00
- To: 09/06/2016, 23:59
- Threshold (kms): 0
- Options (radio buttons): Route Empty (unchecked), Percentage Empty (unchecked), Legs Empty (checked)

The results table shows two entries:

Job	Start Location	End Location	Tractor	Trailer	Driver	Empty Kilometrage
BA/0002116	Barnsley Depot	CALEDONIAN P...	BARN05BA			404
BA/0002116	PENINE BULK S...	Barnsley Depot	BARN05BA			35

Buttons at the bottom: Find In Charts, Refresh, Close, and a Help button (dots).

Figure 176

5. Select a Job then Click on **Find In Charts** - ESP will highlight the loads on the Gantt

Utilisation Analysis

Utilisation Analysis displays the following information for vehicles in the depot:

- Running Time (broken down into Loaded and Empty)
- Unplanned Time
- Total Distance (broken down into Loaded and Empty)
- Total Routes and Legs planned
- Total Cost (broken down into Cost per Hour and per mile/km)

Accessing Utilisation Analysis

1. Click on the **Tools** option on the menu
2. Click **Fleet Utilisation**
3. The Utilisation Filter window is displayed (Figure 177)

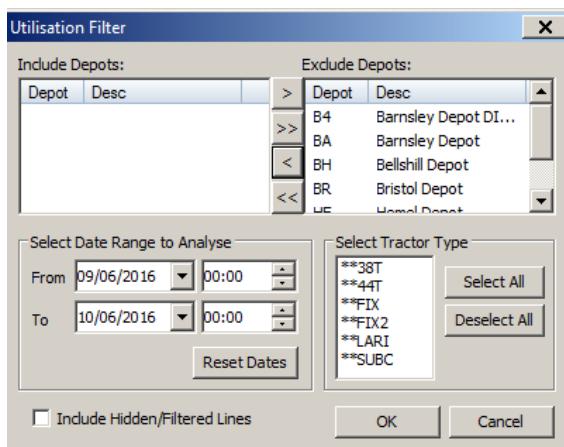


Figure 177

4. Select the Depots to Include or Exclude
5. Select the Date/Time Range to Analyse
6. Select the Tractor Types
7. Select to Include Hidden and Filtered lines if required
8. Click OK

The Utilisation window will be displayed (Figure 178)

Utilisation Analysis			
	Current	Saved	
Total Vehicles	22	0	
Available Hours	528:00	00:00	
Running Time	11:02	2.1 %	00:00
Loaded Time	04:40	42.3 %	00:00
Empty Time	06:22	57.7 %	00:00
Unplanned Time	516:58	97.9 %	00:00
Total Distance	844.535 kms	0	
Loaded Distance	405.535 kms	48.0 %	0
Empty Distance	439.000 kms	52.0 %	0
Total Routes	1	0	
Total Legs	3	0	
Total Cost	£557.75	£0.00	
Total Cost Per Hour	£50.55	£0.00	
Total Cost Per KM	£0.66	£0.00	
Save >>		Close	

Figure 178

Details displayed will be for Own Vehicle.

1. Click on the Subcontract tab to see details for subcontract vehicles
2. Click on the Totals tab to see statistics for both Subcontract and Own vehicles
3. Click on the Filter Details tab to see details of the filters selected for the Utilisation analysis
4. The Details displayed can be saved, and compared with a refined plan .
5. Click **Save >>** and Click **Close** to close the window

Once the plan has been refined to reduce empty running and re-group loads the utilisation details can be viewed again and compared with the details saved on the last plan:

1. Click on the **Tools** option on the menu
2. Click Fleet Utilisation, Alternatively Click  from the Toolbar
3. The Utilisation Filter window is displayed (Figure 177)
4. Enter the same set of criteria
5. Click OK
6. The Utilisation Analysis window will be displayed comparing both sets of statistics (Figure 179)

Utilisation Analysis			
	Current	Saved	
Total Vehicles	22	22	
Available Hours	528:00	528:00	
Running Time	29:10 5.5 %	29:10 5.5 %	
Loaded Time	15:35 53.4 %	15:35 53.4 %	
Empty Time	13:35 46.6 %	13:35 46.6 %	
Unplanned Time	498:50 94.5 %	498:50 94.5 %	
Total Distance	2103.000 kms	2103.000 kms	
Loaded Distance	1120.000 kms 53.3 %	1120.000 kms 53.3 %	
Empty Distance	983.000 kms 46.7 %	983.000 kms 46.7 %	
Total Routes	5	5	
Total Legs	9	9	
Total Cost	£9950.07	£9950.07	
Total Cost Per Hour	£341.15	£341.15	
Total Cost Per KM	£4.73	£4.73	

Figure 179

Note: Only two sets of data can be compared. As soon as the Save button is selected the current figures will override the Saved figures

Vehicle Utilisation

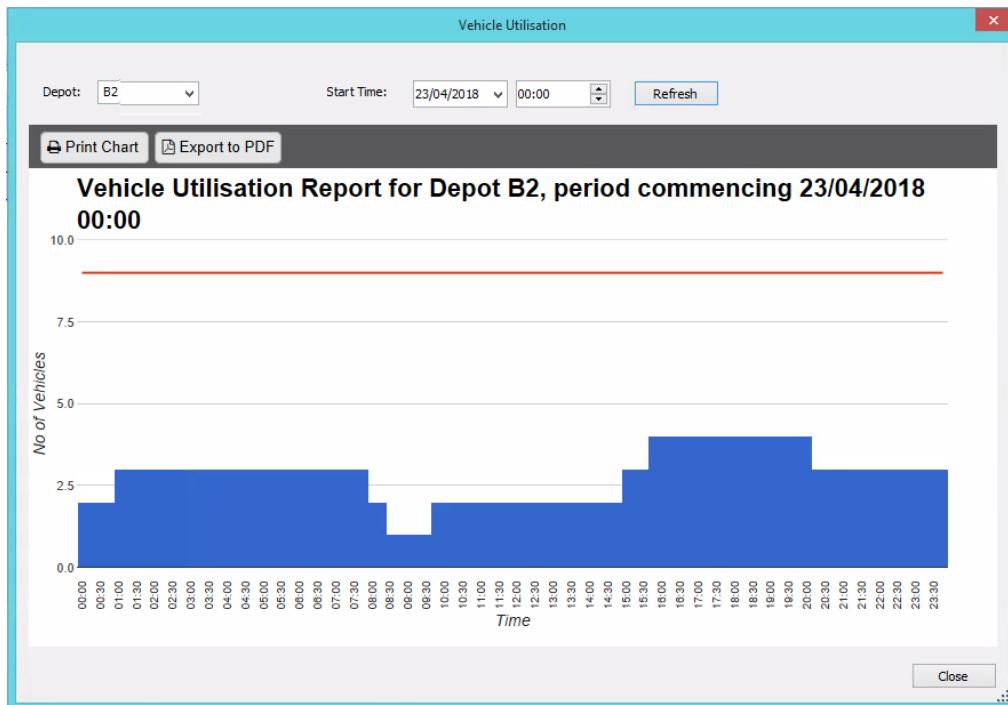
The vehicle utilisation report displays information for a 24-hour period. The report chart represents the vehicles for loads due to depart from the depot in 15-minute slots.

For loads to appear on the report the following criteria must be met:

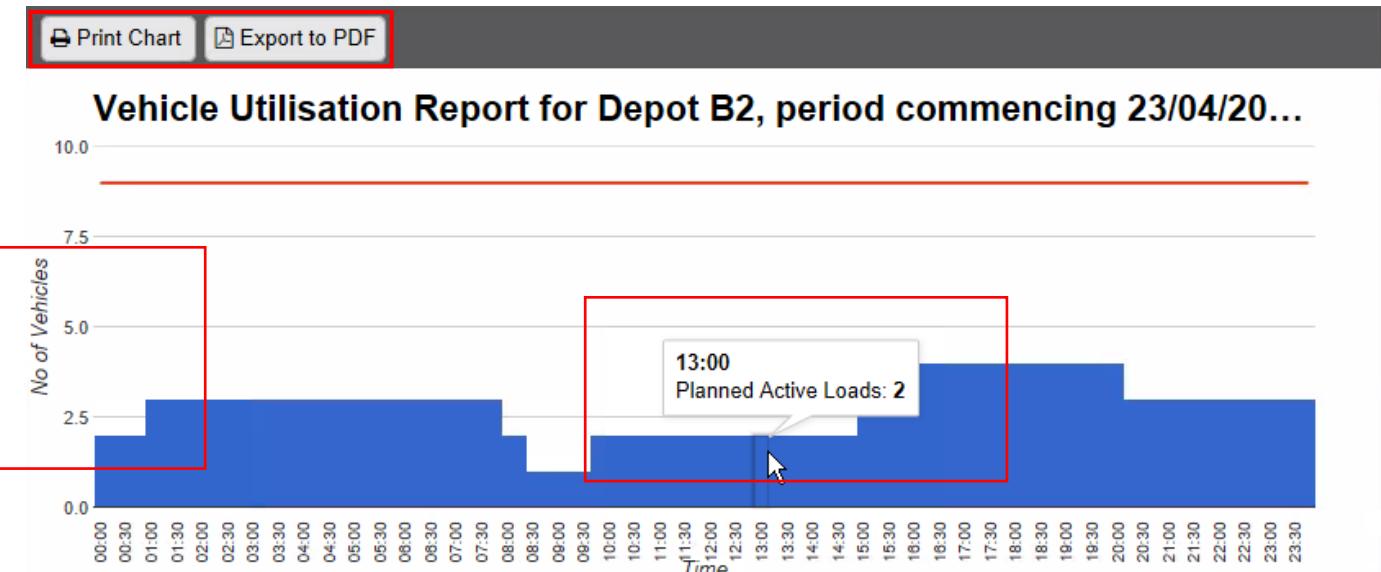
- The load must have a controlling depot that matches the depot selected on the report selection screen
- Loads that have a status of PL, RS or DS will be included
- The report does not show subcontractor work
- The duration of the load (including shift start/end time) must fall within a 15-minute interval for the 24 hours selected
- Routed, empty loads will be included
- Loads that begin before the start date/time or end date/time will be included on the report if the duration including shift start/end falls within the selected time frame
- Loads will need to be resourced with a vehicle to appear on the report
- Loads at CO status will be excluded from the report

Running the Vehicle utilisation report:

1. From the menu:
2. Select Tools, Vehicle utilisation
3. Depot, Click the drop-down arrow and select the depot that the report is to run for
4. Start Time, Select the Start date and time for the report (the report will display data for 24 hours from this date and time)
5. Click Refresh to refresh the chart



6. Hover the mouse pointer over any of the charted data to see the number of loads within the 15-minute time slot
7. Click the print Chart button or Export to PDF button to print the report or save as a PDF



In the example above, at 13:00 (X axis) the number of planned loads is 2, and the number of vehicles is also 2 (Y axis)

Resource and Route Revenue

Statistics for Resource and Route revenue are available for planned loads on the Gantt. Information can be displayed for a Date Range or for an individual Route or Vehicle

Revenue Analysis by Date

1. Click on the **Tools** option on the menu
2. Click Revenue Analysis
3. The Revenue Analysis window is displayed (Figure 180)

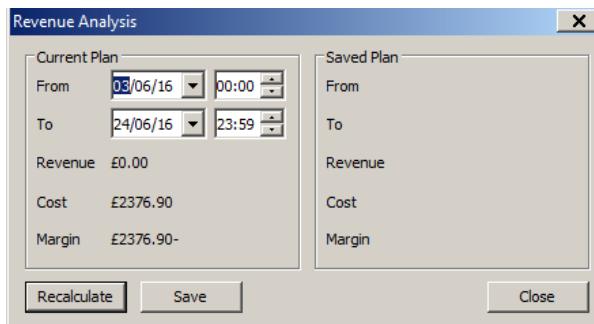


Figure 180

4. Select a Date/Time Range
5. Click Recalculate
6. Click Save if required (the figures will now be displayed in the Saved Plan area of the window)

Resource Revenue (By Tractor)

1. Right Click on any Tractor on the Gantt
2. Click **Resource Revenue**

The Tractor Revenue window is displayed(Figure 181)

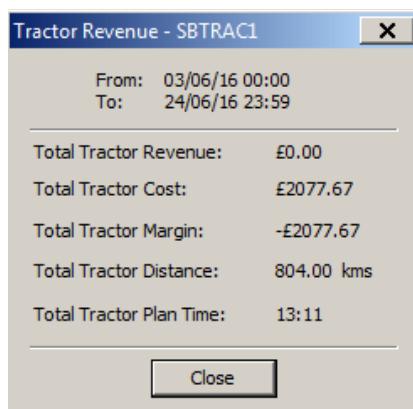


Figure 181

- The Route Revenue will be populated from the Revenue on GTS
- The Route Cost will be based upon the running cost of the vehicle and the distance travelled

ESP Costs and Revenue

Once the values have been setup in GTS for Internal Revenue and Costs, the costs will be calculated in ESP and visible in the following columns.

Job	Revenue	ID Cost	ID Revenue
BI/123	£300	£100	
RU/855			£100

In the example above the original job in depot BI is passed to depot RU. The original has a customer revenue figure of £300, the ID cost field will hold the inter depot cost of £100. The inter-depot job created for depot RU has no customer revenue, however the ID Revenue field displays the revenue for the depot.

Gantt Filters

The Vehicles displayed on the Gantt chart can be filtered to show resource with work planned in a date range, resource visiting a traffic area or resource in selected resource pools.

Filter the Gantt

1. Right Click on a Tractor
2. Click Filter

The Plan Line (Primary Resource) filter window is displayed

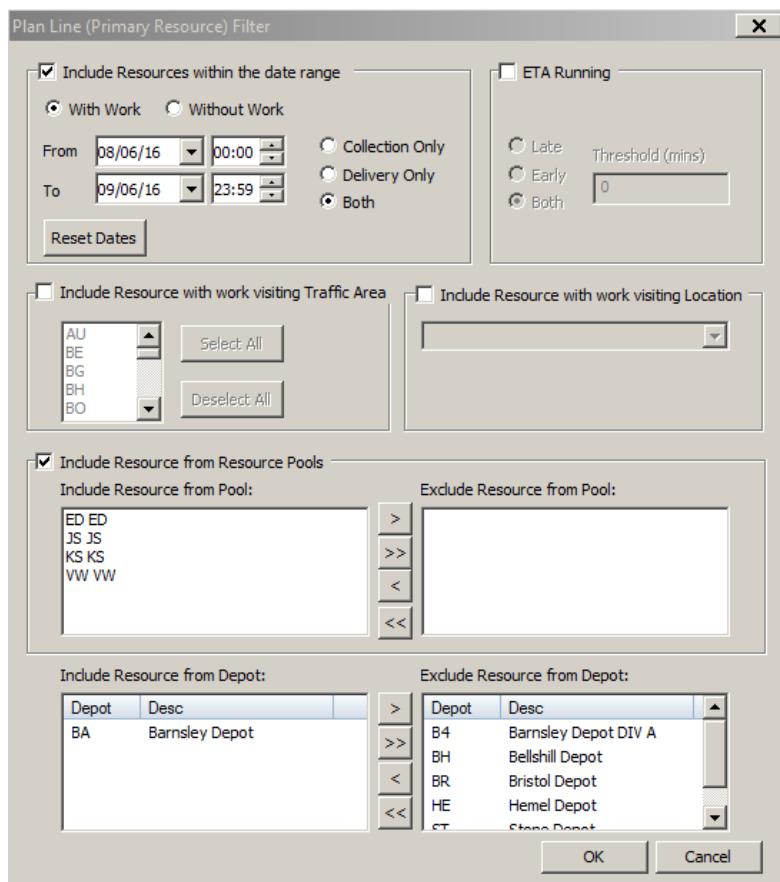


Figure 182

3. Select the relevant filter section (for example Include resource with work in the date range)
4. Select the relevant filter criteria (for example a From and To Date and Time Range)
5. Click OK

Only Tractors that meet the criteria will be visible on the Gantt

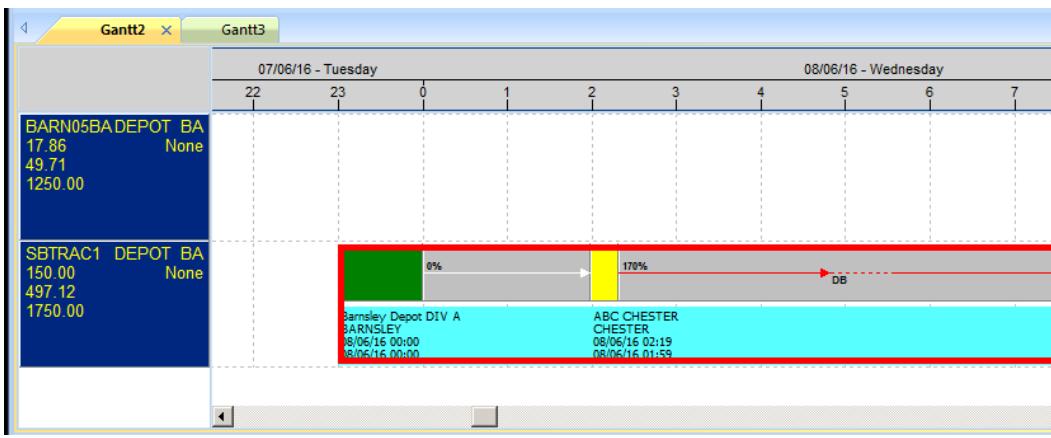


Figure 183

Removing Gantt Filters

To remove a filter

1. Right Click on a Tractor on the Gantt
2. Click **Show All**

Creating New Gantt Charts

New Gantt charts can be displayed each with a different filter applied; this makes it easier to view vehicles for a particular resource pool or date range on one Gantt and details for another resource pool or date range on the other.

1. Click File, New Gantt from the menu
2. The new Gantt chart will be displayed

Each Gantt that is created will be named Gantt 1, 2 3... (Figure 184)

Filters can be applied to each Gantt if required to display different vehicles meet filtering criteria. The example below displays two Gantt charts each with a different set of resources shown.

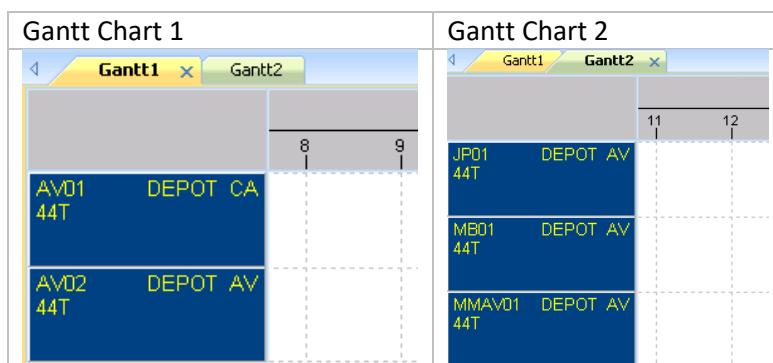


Figure 184

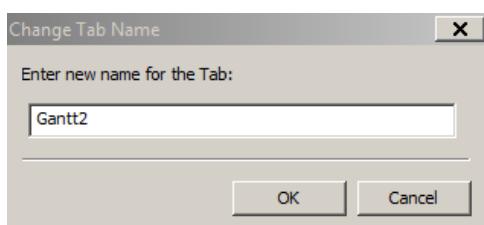
The Charts displayed can be closed if required by clicking on the  at the top of the window.

Renaming Gantt Charts

Gantt charts can be renamed if required:

1. Right Click on the Tab Name
2. Click Set Name

The Change Tab Name dialog box will be displayed



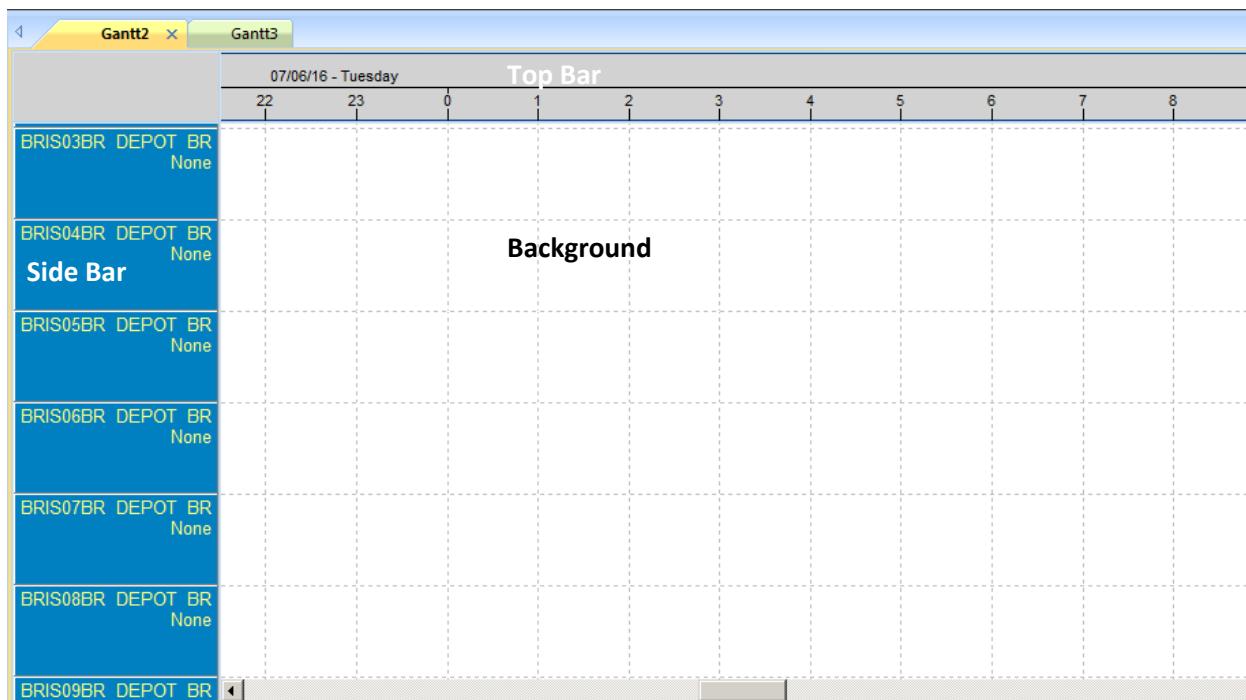
3. Key in the New Name for the Gantt
4. Click OK

Customising ESP

Gantt Chart

The Gantt chart has three distinct areas. **Side Bar**, **Top Bar** and **Background**. Each of these areas can be customised, colours can be changed and the level of information displayed can also be determined by the user. Changes made will be retained by ESP each time the user logs in.

Gantt Chart Areas



Side Bar

1. Right click on any **Tractor** displayed on the **Side Bar**
2. Click **Options**
3. The Gantt Options window will open at the Side Bar tab

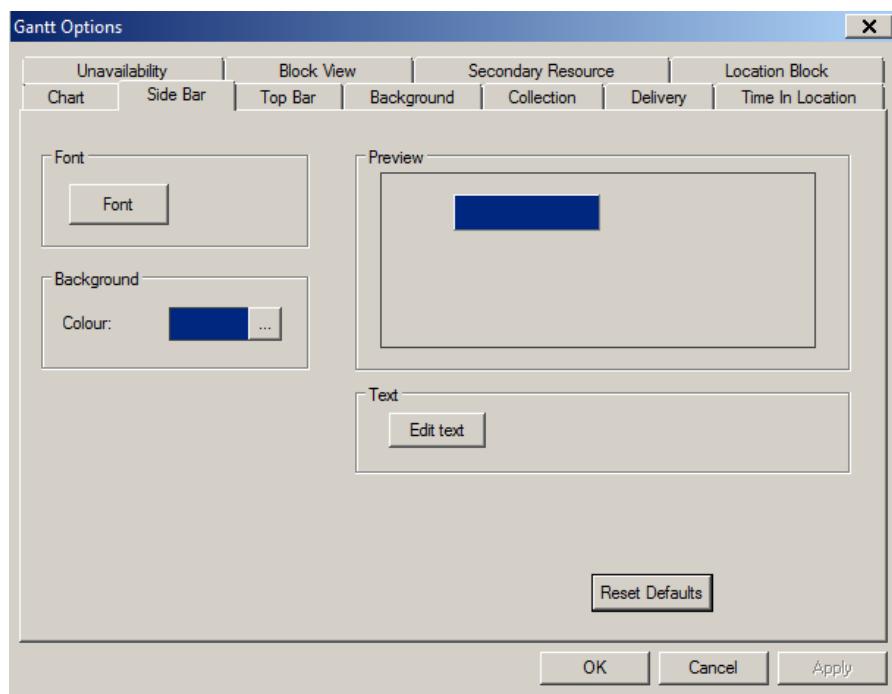


Figure 185

Font

1. To change the font displayed on each block representing a tractor
2. Click **Font** (Figure 185)

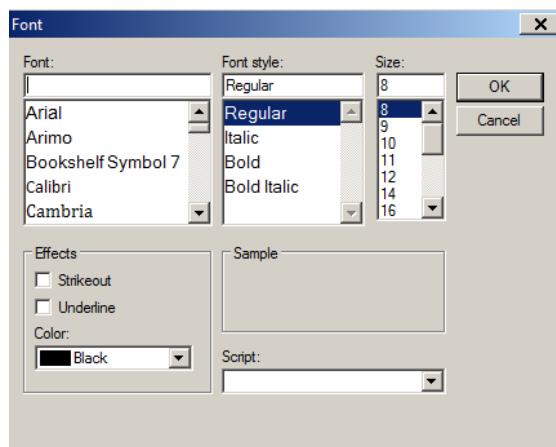


Figure 186

3. Select a Font, Style, Colour and Size
4. Click **OK**

Text

1. Change the labels displayed against each tractor
2. Click Edit Text (Figure 185)
3. The Edit Cell Text window is displayed

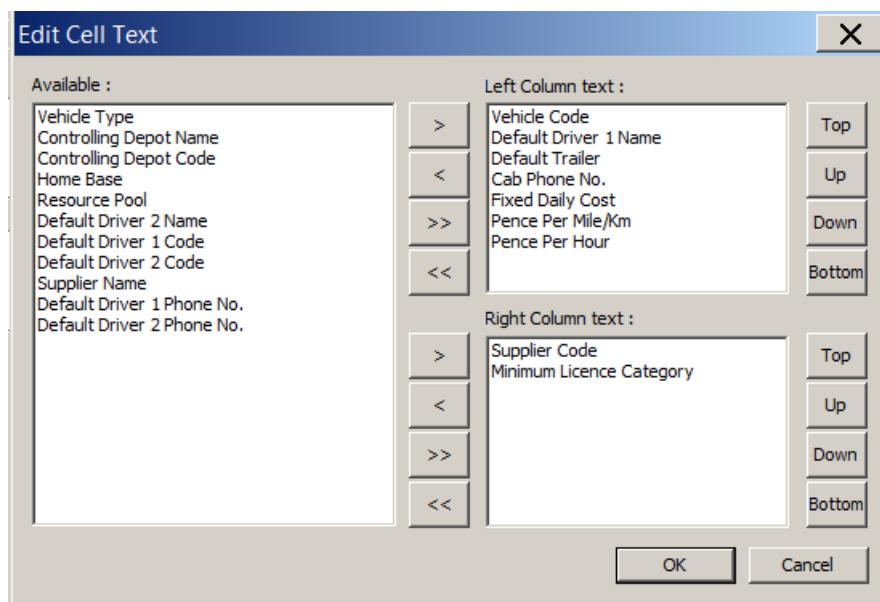


Figure 187

Text can be displayed in either left, right columns or both if required.

4. Click on the **Text** from the available section on the left (Figure 187)
5. Click  to add the text to either of the **Left** or **Right Column text** boxes
6. Click  to add all the **Text** to either the **Left** or **Right Column text** boxes
7. Removing a label
8. Click to Select the **Text** from either the **Left** or **Right Column text** boxes
9. Click 
10. Alternatively, Click  to remove all the **Text** from either the **Left** or **Right Column text** boxes

Reposition labels

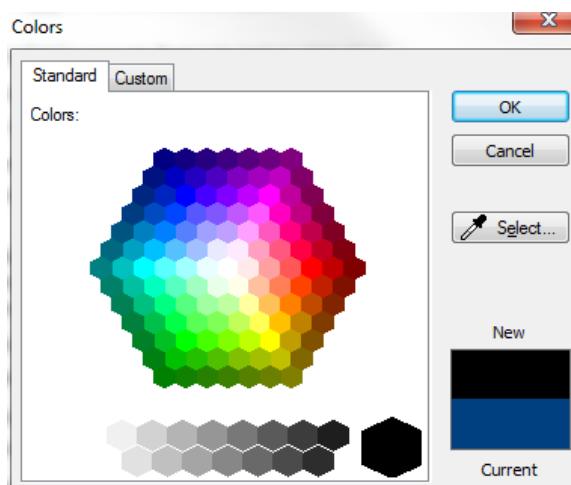
To move labels upwards or downwards in each Tractor Block:

1. Click on the **Text**
2. Click  to move the **Text** to the top of the block, alternatively,
3. Click  to move the **Text** up by one
4. or:
5. Click  to move the **Text** down by one
6. Click  to move the **Text** to the bottom of the block
7. Click **OK** to confirm the changes and return back to the **Side Bar** options window(**Figure 185**)
8. Alternatively, Click **Cancel** to cancel the changes and return back to the **Side Bar** options window(**Figure 185**)

Background Colour

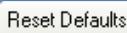
Change the background colour of blocks in the side bar:

1. From the **Side Bar Options Window** (Figure 185)
2. Click  by colour



1. Select a Colour from the palette
2. Click  to confirm the changes and return back to the Side Bar options window(Figure 185)

Apply the Changes

1. Click  to apply the changes
2. Alternatively, Click  to restore the ESP default settings

Top Bar

1. Right Click on the **Top Bar** (Date and Time line)
2. Click 

The Gantt Options window opens at the Top Bar Options window is displayed:

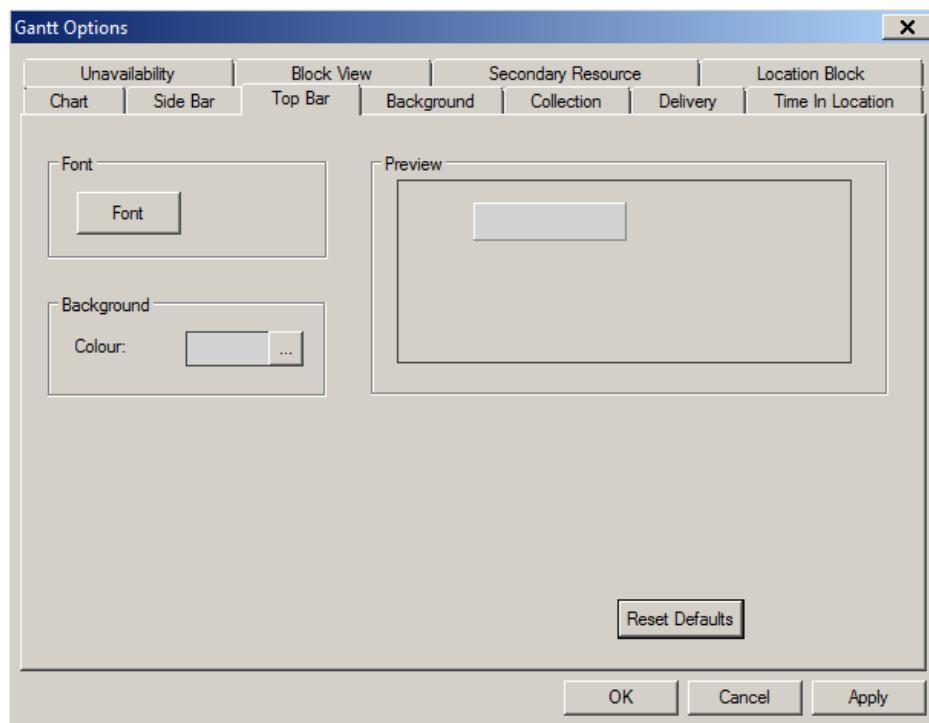


Figure 188

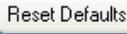
Font

1. Click  (Figure 188)
2. Change the **Font**, **Font Style**, **Size** and **Colour** as required
3. Click  to return back to the **Top Bar** Options window (Figure 188)

Change the background colour displayed on the Top Bar

1. Click  by colour
2. Select a Colour from the palette
3. Click  to confirm the changes and return back to the **Top Bar** options window (Figure 188)

Apply the Changes

4. Click  to apply the changes
5. Alternatively, Click  to restore the ESP default settings

Background

1. Right Click on the **Background** area of the Gantt chart
2. Click 

The Gantt Options window opens at the Gantt Options window is displayed:

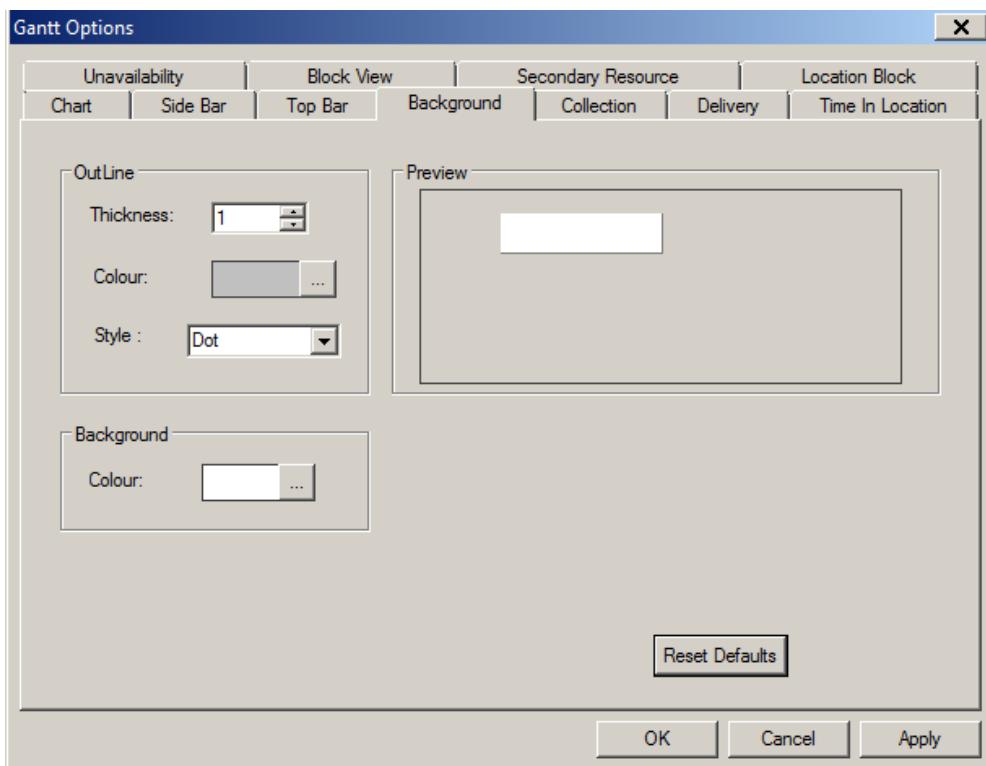
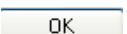
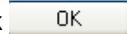


Figure 189

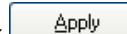
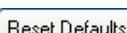
Outline

1. Click  by **Thickness** to increase or decrease the Outline thickness
2. Click  by **Colour**, Select a **Colour** from the palette, Click 
3. Select a different **Style** if required (Solid, Dash, Dot, Dash Dot, Dash Dot Dot)

Background Colour

1. Click  by colour
2. Select a **Colour** from the palette
3. Click  to confirm the changes and return back to the **Background options window** (Figure 189)

Apply the Changes

1. Click  to apply the changes
2. Alternatively, Click  to restore the ESP default settings

Other Gantt Chart Options

From the ESP menu

1. Click **Tools**
2. Click **Chart Options**
3. Click **Gantt**

The Gantt Options window is displayed:

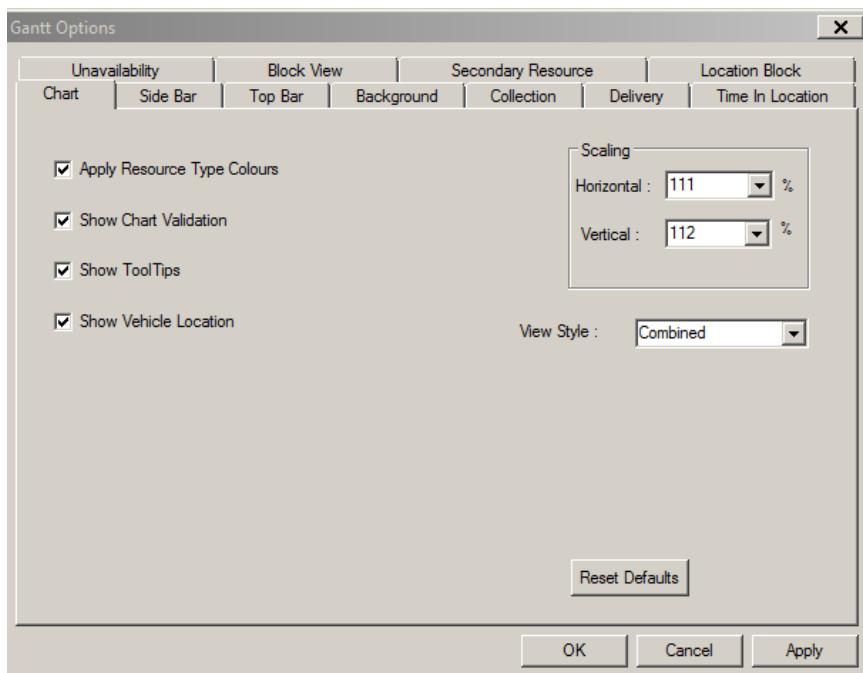


Figure 190

There are eleven tabs enabling further customisation of ESP, three of which (Side Bar, Top Bar and Background) have been covered in the previous section.

Chart

The Chart defaults are used to define the overall look of the Gantt Chart. The tick boxes relate to how planned information should be displayed on the Gantt chart.

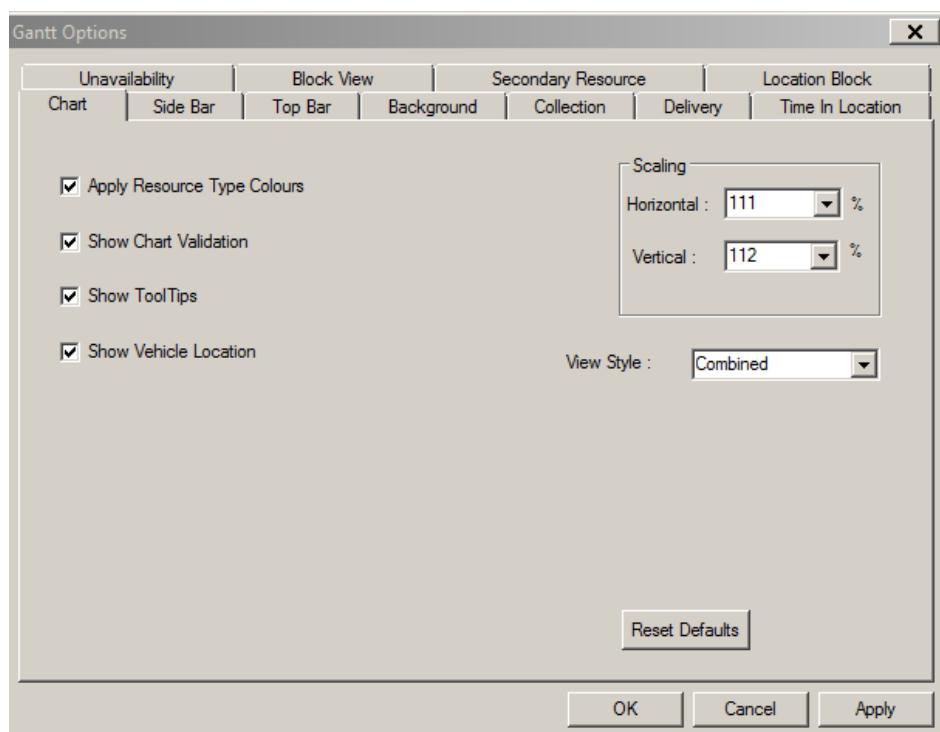


Figure 191

Apply Resource Type Colours

If selected will use the resource type colours setup in Tools, Chart Options, All (see the section on Resource Type Colours (side bar))

Show Chart Validation

When jobs are planned on the Gantt ESP can perform validation to indicate if jobs can be dropped at a certain point on the time line. If this option is selected as the mouse pointer is moved over the Gantt any areas on the chart that aren't valid for the job will be shaded (Figure 192)

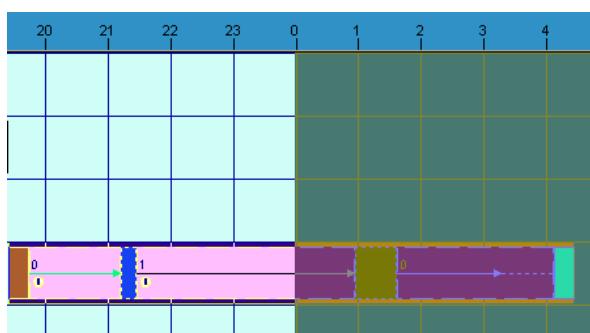


Figure 192

Show Tooltips

Planned Jobs are displayed as coloured blocks on the Gantt. With tooltips selected, if the mouse pointer is moved over any of the blocks on the Gantt an information tooltip will be displayed (Figure 193) detailing collection, delivery, distance travelled and secondary resource.

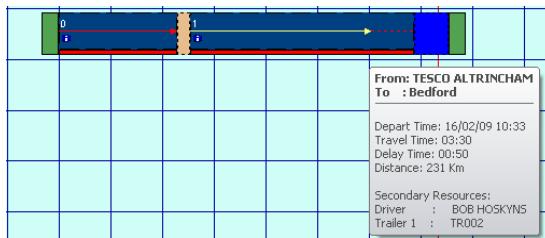
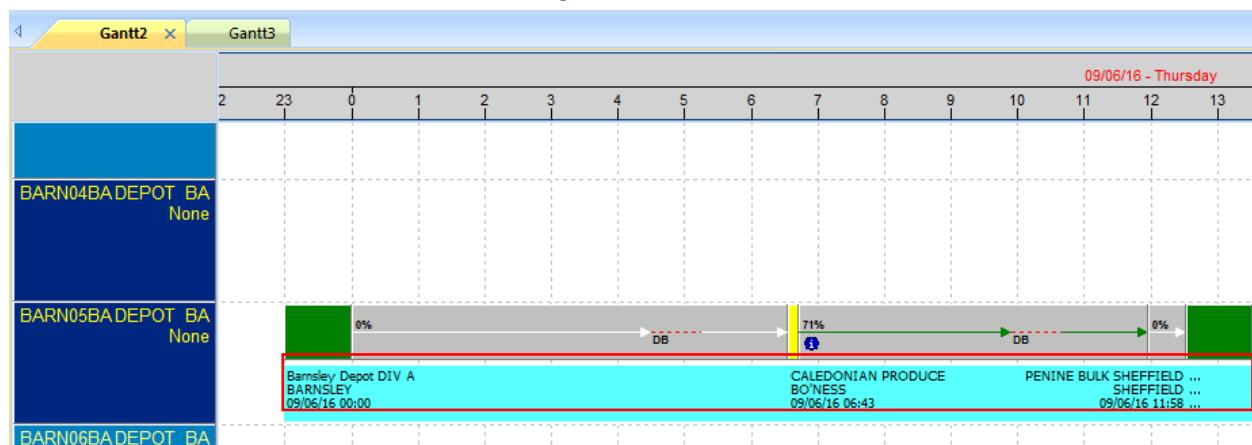


Figure 193

Show Vehicle Location

This enables the vehicle location block on the gantt, the labels visible are set in the location block tab



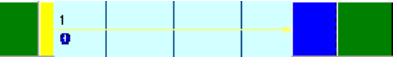
Scaling

When scaling options are selected the Gantt can be scaled down in size. The default setting is 100% for both Vertical and Horizontal scaling. Percentages can be increased or decreased as required to either increase or decrease the size of the Gantt chart as required.

Note: Downsizing the scaling on the Gantt will decrease the overall size of information on the chart. This may lead to some information appearing misaligned especially if a very small scaling is requested.

View Style

1. Select the relevant Supplier from the Window – Note, you can key in part of the supplier name in the text field to search for the supplier
2. Click OK

Combined View	Block view
	
Detail View	Empty Running View
	

Once any changes have been made they will need to be applied:

1. Click  to apply the changes
2. Alternatively, Click  to restore the ESP default settings

Planned Jobs Options

The Options for **Collection**, **Delivery**, and **Time in Location** affect the colours of the blocks (Figure 194) that represent planned jobs on the Gantt.

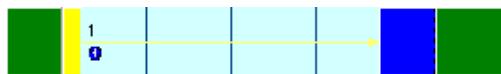


Figure 194

From the ESP menu

1. Click **Tools**
2. Click **Chart Options**
3. Click **Gantt**

The Gantt chart Options Window is displayed (Error! Reference source not found. – Next Page)

Collection Tab

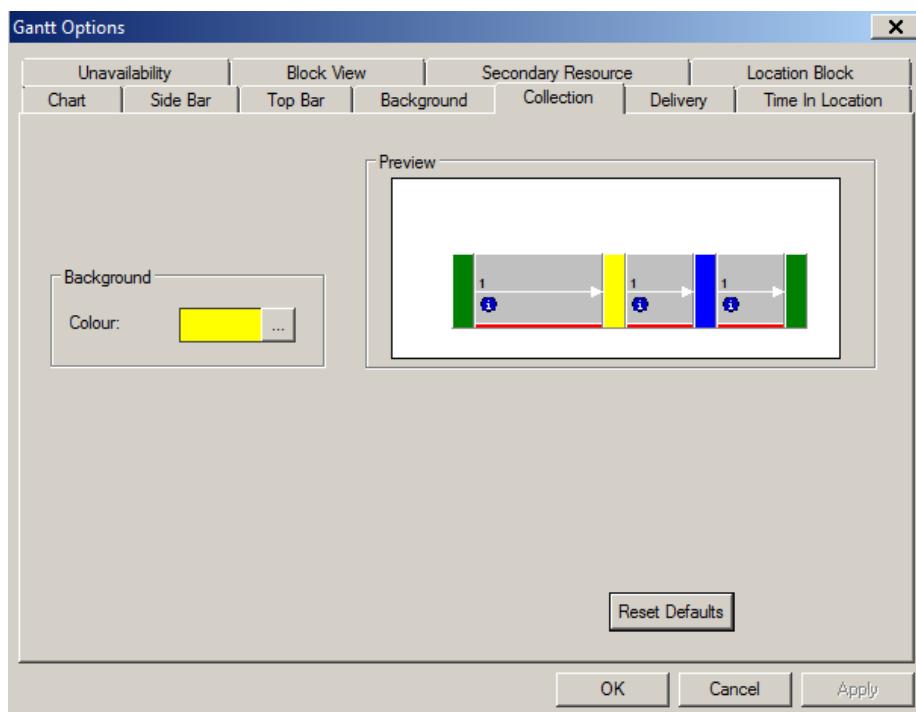


Figure 195

Change the background colour displayed for Collections on the Gantt

1. From the Gantt Chart Options window
2. Click the Collection Tab (Figure 195)
3. Click by colour
4. Select a **Colour** from the palette
5. Click to confirm the changes and return back to the Collection options window

Apply the Changes

1. Click **Apply** to apply the changes
2. Alternatively, Click **Reset Defaults** to restore the ESP default settings

Delivery Tab

Change the background colour displayed for Deliveries on the Gantt

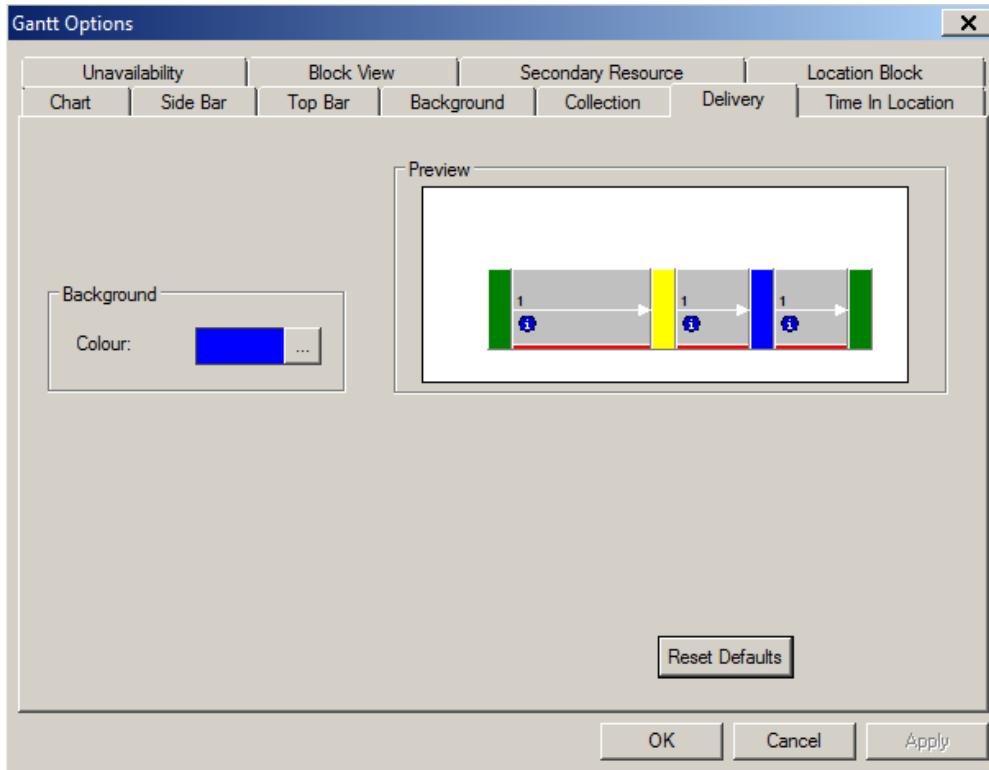


Figure 196

From the Gantt Chart Options

1. Click the **Delivery Tab** (Figure 196)
2. Click by Colour
3. Select a **Colour** from the palette
4. Click **OK** to confirm the changes and return back to the Delivery options window
5. Apply the Changes
6. Click **Apply** to apply the changes
7. Alternatively, Click **Reset Defaults** to restore the ESP default settings

Time in Location

Change the background colour displayed for Time in Location on the Gantt

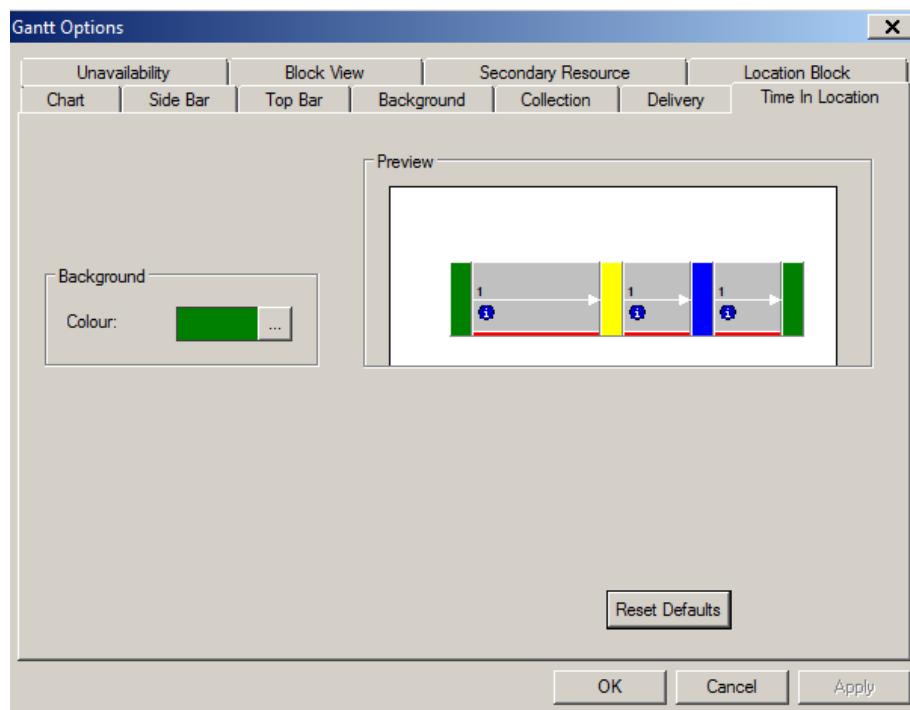


Figure 197

From the Gantt Chart Options window

1. Click the Time in Location Tab (Figure 197)
2. Click by colour
3. Select a Colour from the palette
4. Click OK to confirm the changes and return back to the Time in Location Window
5. Apply the Changes
6. Click Apply to apply the changes
7. Alternatively, Click Reset Defaults to restore the ESP default settings

Secondary Resource Colours

When secondary resources are applied to a job, coloured lines identify what type of resource has been allocated. Different colours can be applied to **Fully Resourced** jobs, Jobs with a **Driver allocated** or jobs with a **Trailer allocated**.

From the ESP menu

1. Click Tools, Chart Options
2. Click **Gantt**
3. Click the **Secondary Resource** Tab (Figure 198)

Secondary Resource Colour Options

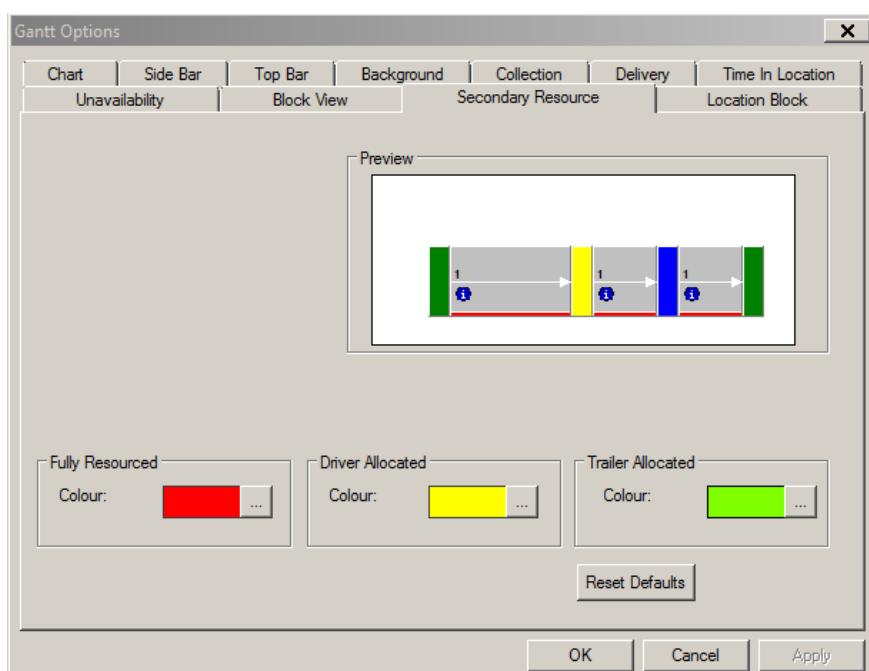


Figure 198

From the Secondary Resource window

1. Click by Colour
2. Select a **Colour** from the palette
3. Click to confirm the changes and return back to the **Secondary Resource Window**

Apply the Changes

1. Click to apply the changes
2. Alternatively, Click to restore the ESP default settings

Block View

Block View displays jobs as one continuous block on the Gantt. Text labels can be added to this view for **Resource and Delivery**

From the ESP menu

1. Click Tools, Chart Options
2. Click **Gantt**
3. Click the **Block View** Tab

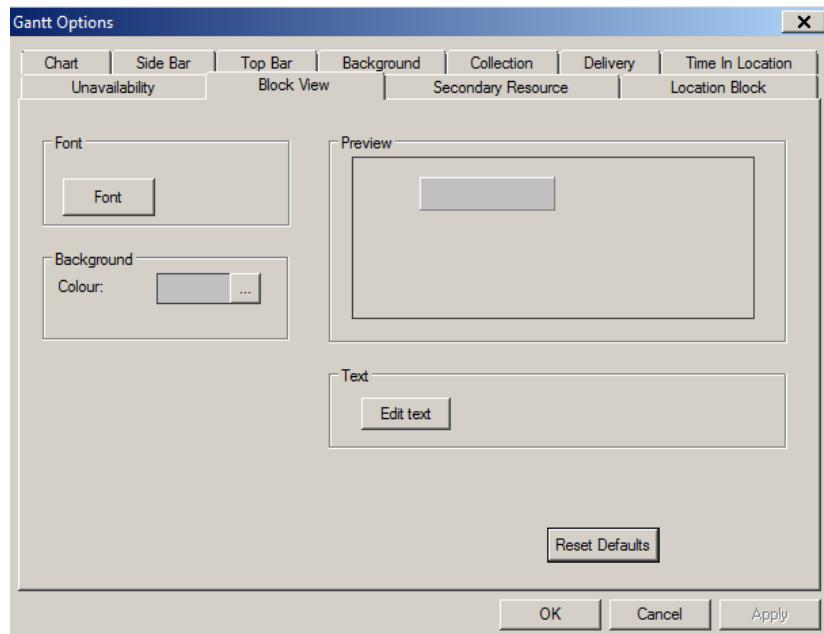


Figure 199

1. Click **Font** and select a font/Size/Colour/Style for labels on block view
2. Click **OK**
3. The Block view options window will be displayed
4. Click **...** by colour
5. Select a **Colour** from the palette
6. Click **OK** to confirm the changes and return back to the **Block View Window**

Edit Text

1. Click **Edit text**
2. The Edit Cell Text window is displayed (Figure 200)

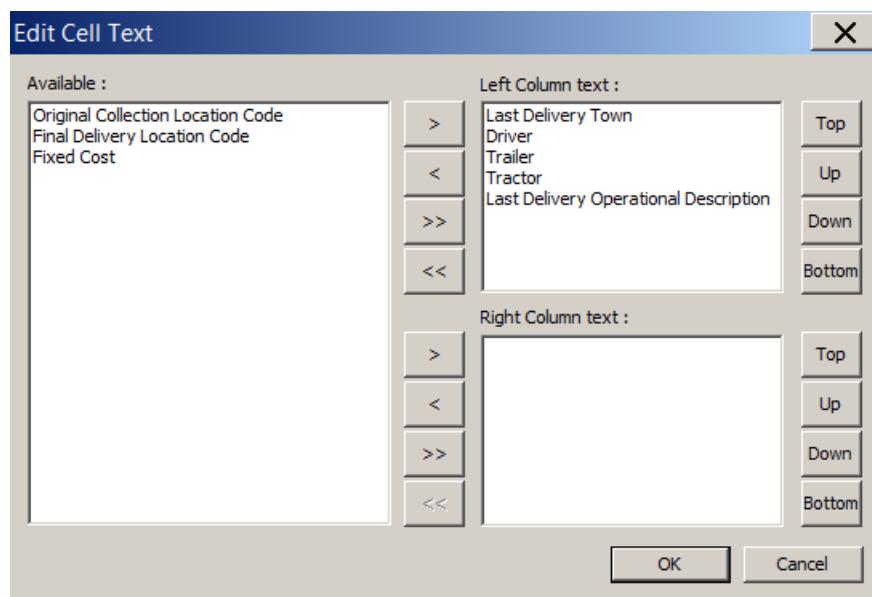


Figure 200

Text can be displayed in either left, right columns or both if required.

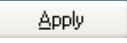
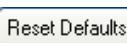
3. Click on the Text label from the Available : section
4. Click [>] to add the label to either of the Left or Right column text boxes
5. Alternatively, Click [>>] to add all the labels to either the Left or Right Column text boxes
6. To Remove a label
7. Click to Select the label from either the Left or Right column Text boxes
8. Click [<]
9. Click [<<] to remove all the labels from either the Left or Right Column text boxes

Reposition labels

To move labels upwards or downwards in each Block:

1. Click on the Label
2. Click [Top] to move the label to the top of the block, alternatively
3. Click [Up] to move the label up by one
4. or:
5. Click [Down] to move the label down by one
6. Click [Bottom] to move the label to the bottom of the block
7. Click [OK] to confirm the changes and return back to the Side Bar options window
8. Alternatively, Click [Cancel] to cancel the changes and return back to the side bar options window

Apply the Changes

1. Click  to apply the changes
2. Alternatively, Click  to restore the ESP default settings

The text labels and colour changes will be visible on the Gantt when Block View is selected

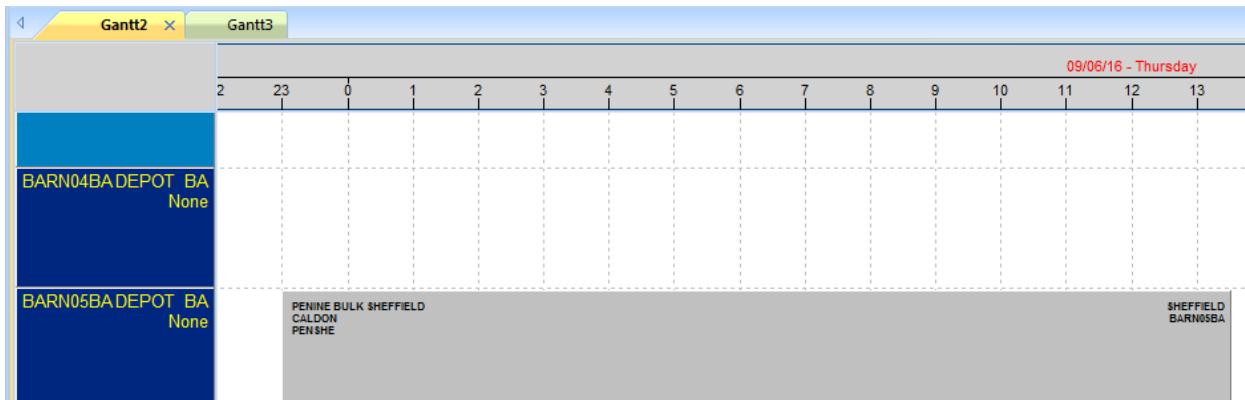


Figure 201

Tractor Unavailability

Tractor Unavailability is setup in GTS against the Tractor in the Tractor Master File. When Tractors are made unavailable in GTS jobs cannot be planned to the tractor for the duration of the unavailability. Unavailability is shown on the Gantt as a shaded block.

From the ESP menu

1. Click **Tools**
2. Click **Chart Options**
3. Click **Gantt**
4. Click the  tab

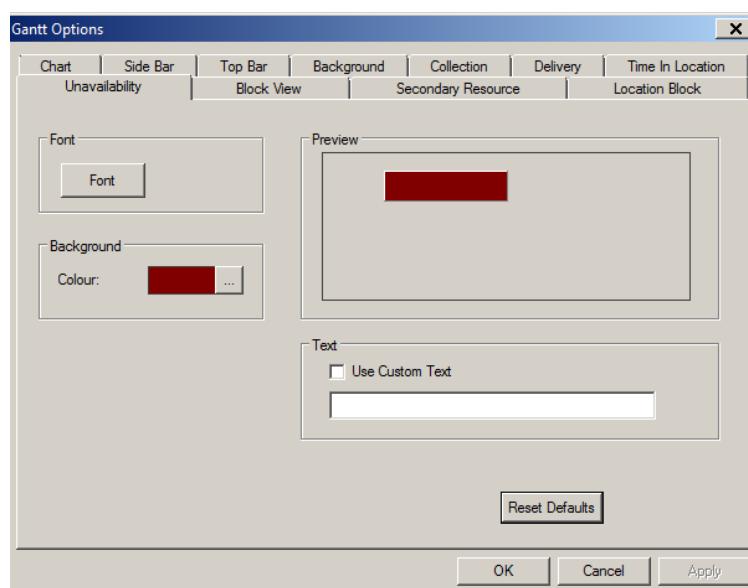


Figure 202

Font

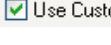
Determines the Font style for Custom Text

1. Click  **Font**
2. Change the **Font, Font Style, Size and Colour** as required
3. Click  **OK** to return to the unavailability options window

Set Colours for the Availability

1. Click  by colour
2. Select a colour from the palette
3. Click  **OK** to confirm the changes and return back to the **Unavailability Window**(Figure 202)

Use Custom Text

1. Click  **Use Custom Text** and key in the text to be displayed on the Gantt chart to signify that a tractor is unavailable
2. Change the **Font, Font Style, Size and Colour** as required
3. Click  **OK** to return to the **Top Bar Options** window

Location Block

The Location block can be switched on from Chart Options, the labels and colour of the block can be set by changing the defaults on this tab.

From the ESP menu

1. Click **Tools**
2. Click **Chart Options**
3. Click **Gantt**
4. Click the Location Block tab

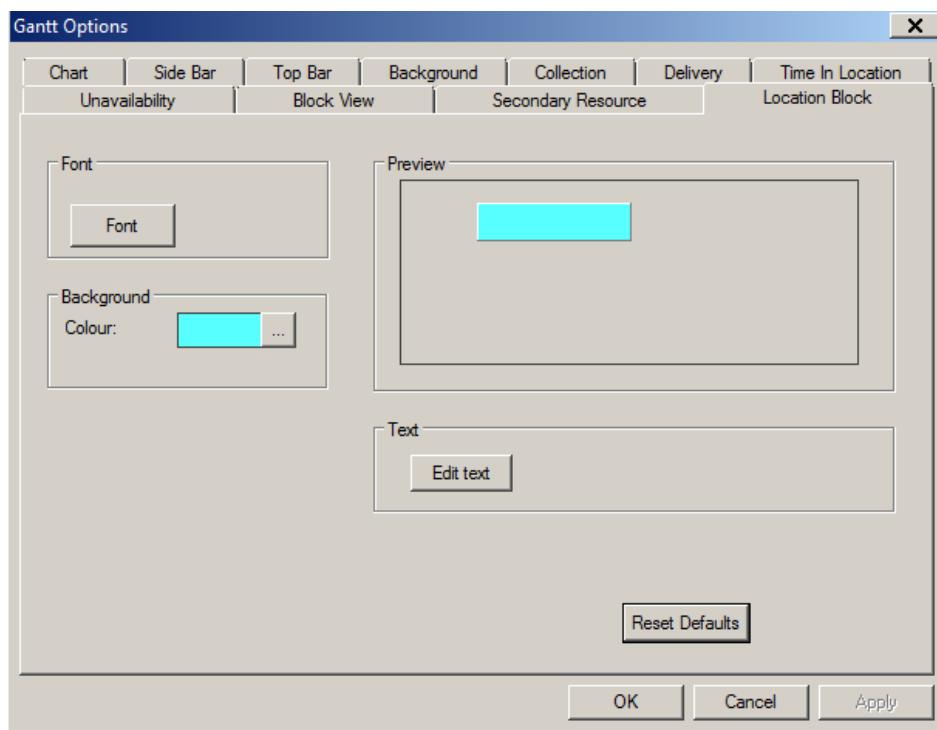


Figure 203

1. Click **Font** and select a font/Size/Colour/Style for labels on block view
2. Click **OK**
3. The Location Block view window will be displayed
4. Click **...** by colour
5. Select a **Colour** from the palette
6. Click **OK** to confirm the changes and return back to the **Location Block View Window**

Edit Text

1. Click **Edit text**

The Edit Cell Text window is displayed (Figure 200)

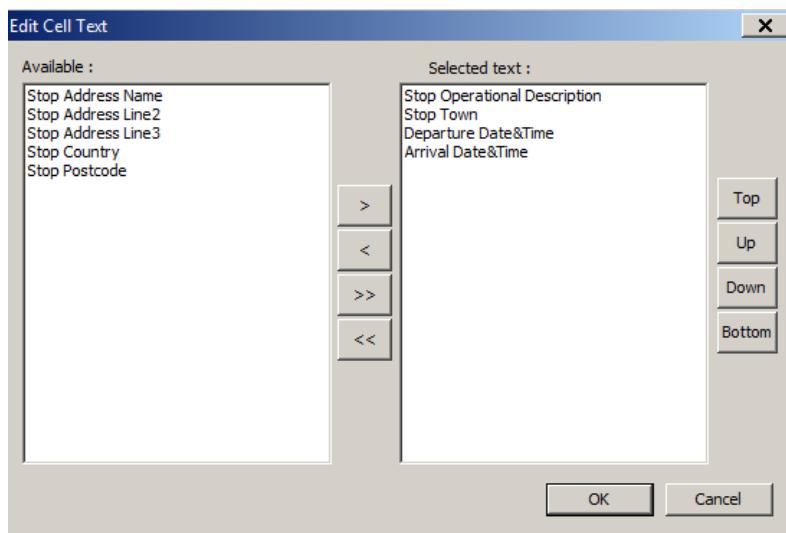


Figure 204

Text can be displayed in either left, right columns or both if required.

2. Click on the Text label from the Available : section
3. Click > to add the label to either of the Left or Right column text boxes
4. Alternatively, Click >> to add all the labels to either the Left or Right Column text boxes

To Remove a label

1. Click to Select the label from either the Left or Right column Text boxes
2. Click <
3. Click << to remove all the labels from either the Left or Right Column text boxes

Reposition labels

To move labels upwards or downwards in each Block:

1. Click on the Label
2. Click Top to move the label to the top of the block, alternatively
3. Click Up to move the label up by one

or:

1. Click Down to move the label down by one
2. Click Bottom to move the label to the bottom of the block
3. Click OK to confirm the changes and return back to the Side Bar options window
4. Alternatively, Click Cancel to cancel the changes and return back to the side bar options window

Apply the Changes

1. Click Apply to apply the changes
2. Alternatively, Click Reset Defaults to restore the ESP default settings

Resource Type Colours (Side Bar)

The Gantt chart displays GTS Tractor resource in the Side Bar. Each vehicle has a tractor type which is setup against the tractor in the GTS master file. Chart options in ESP allow each type of Tractor to be displayed in a different colour if required.

From the ESP menu

1. Click **Tools**
2. Click **Chart Options**
3. Click **All**

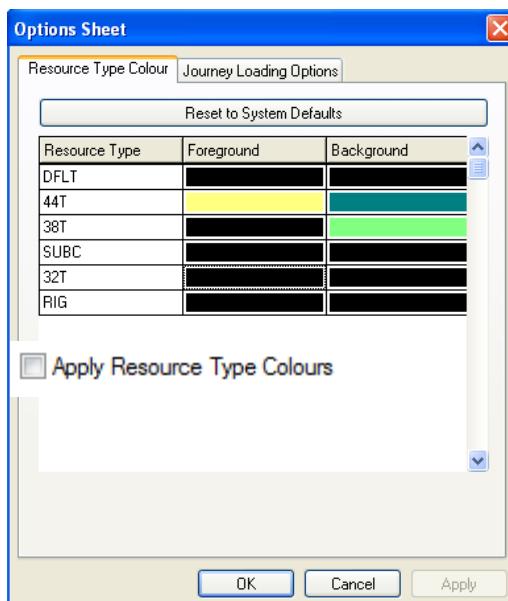


Figure 205

All tractor types setup from the GTS master file will be displayed.

Set the Foreground and Background colours for Resource Types:

1. Double Click on the **Foreground** Colour for the resource type
2. Click to select a colour from the colour pallet
3. Click **OK**
4. Double click on the **Background** colour for the resource type
5. Click to select a **Colour** from the colour pallet
6. Click **OK**

Note: for the colours to be applied to the Gantt – **Apply Resource Type Colours** must be selected from the Chart Options Tab

Journey Loading Options (Capacity Settings Gantt)

Loading options determine at what percentage a job is considered Over Capacity, At Risk, Fully or Highly loaded. ESP options allow a Unit of measure (Scheduling Equivalent 1 or 2, Cubic capacity or Weight) to be chosen for the measure. Colours can also be used to determine when a job is Over Capacity, At Risk, Fully, High, Low or Running Empty.

Access Journey Loading Options:

1. From the ESP menu
2. Click Tools
3. Click Chart Options
4. Click **All**
5. Click on **Journey Loading Options**

The Options Sheet will be displayed (Figure 206)

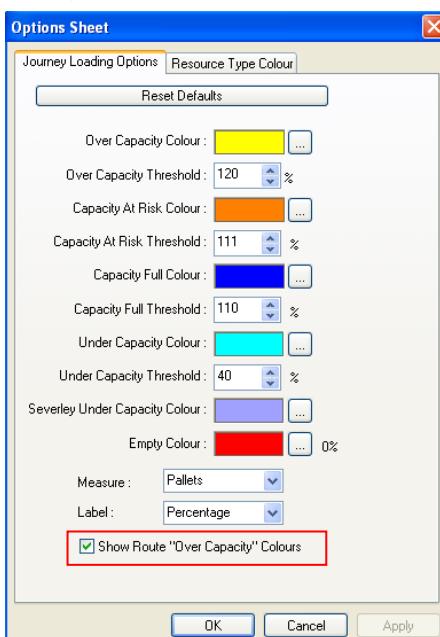


Figure 206

6. Click by colour
7. Select a colour from the palette for Fully, Under, Severely Under and Empty.
8. Click OK to confirm the changes and return back to the Options Sheet
9. Key in a percentage threshold for each capacity
10. Select the appropriate unit of Measure (Scheduling equivalent 1 or 2, Cubic Capacity or weight)
11. Select a Label for example, Percentage will display the over capacity as a percentage of the overall capacity of either the vehicle type or trailer type if a trailer is applied to the job

Once jobs have been planned the Journey line will reflect the load, identifying if the load is High, Low, Fully loaded or Empty. The Job will be highlighted (line will surround the job) if the vehicle is over capacity - Figure 207

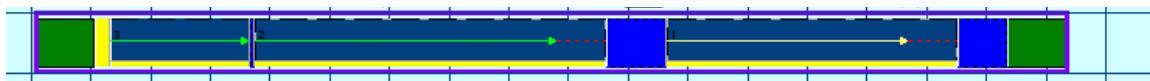


Figure 207

Over Capacity Colours

The Colours for Capacity at Risk and Over Capacity will only apply when the Advanced Capacity Checking function is switched on in ESP Admin.

Also the Show route over capacity colours option must be selected on the Journey Loading Options tab *Figure 206*

Select Colours for Over Capacity and Capacity at Risk

1. Click 
2. Select a colour from the palette, Click  to confirm the changes and return back to the Options Sheet
3. Key in a percentage for the Over Capacity and At Risk Thresholds

Jobs over capacity or at Risk will be shaded on the Gantt and the Traffic Sheet:

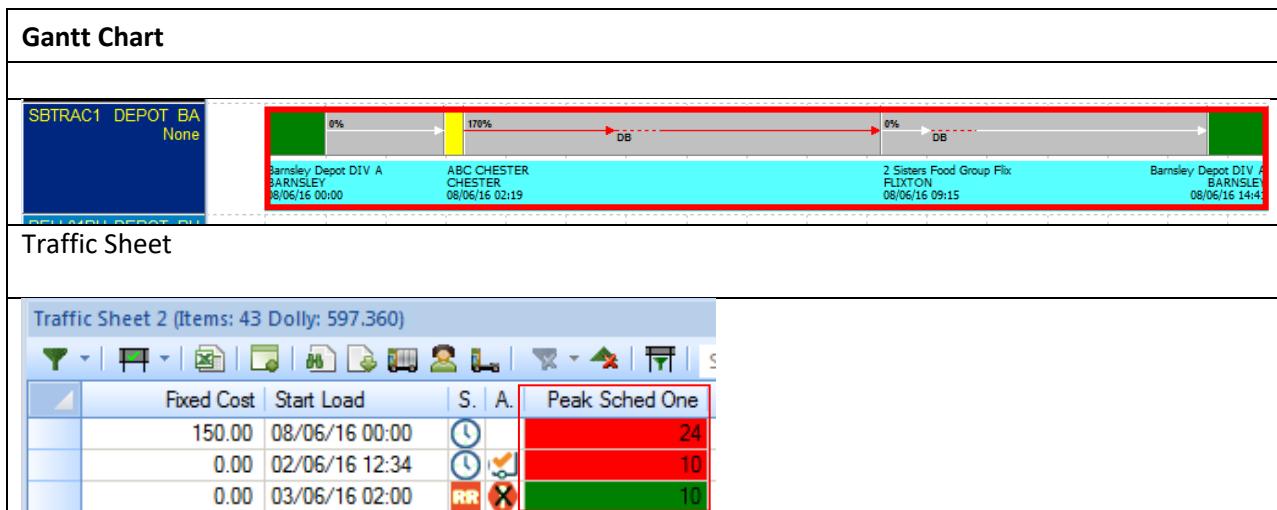


Figure 208

Changing the Distance Unit of Measure

Select from either Kilometres or Miles (this is the unit of measure used for ESP routes)

1. Click **Tools, Preferences...** from the ESP menu

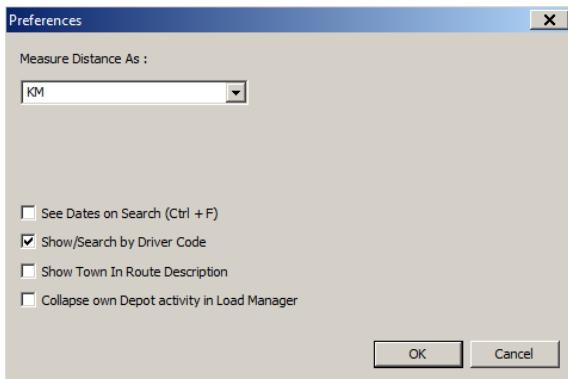


Figure 209

2. Measure Distance As, Select either KM or Miles

3. Click OK to Confirm the change

Status bar

Show or Hide the Status Bar:

1. Click View from the menu
2. Click Status Bar

The status bar will be visible at the bottom of the screen (the status bar was used to display information relating to the upload and download in previous versions of ESP)

Message Bar (Traffic Feed)

Select to show or hide the Message bar (if shown this will appear at the top of the ESP Window) System related messages, for example details received from a Traffic Feed will be displayed here.

Show or Hide the Message Bar:

1. Click View from the menu
2. Click Message Bar

The message bar either be visible or hidden from the top of the screen

Customising Windows

Moving and Positioning Windows

Windows can either be floated or docked or Auto-hidden in ESP. This applies to all windows available from the windows option on the menu.

Display Order Pool, Traffic Sheet or Supplier Bin

1. Click File from the menu,
2. Click on the relevant option, New Order Pool, New Traffic Sheet or New Supplier Bin
32. Alternatively Click  from the toolbar to display the order pool

Docking Windows

There are four dock positions available for windows in ESP. Windows can either be positioned at the top, bottom, left or right of the screen. When a window is repositioned dock arrows appear on the screen these arrows determine the position of the window.

Display the window to be Docked:

1. Move the mouse pointer onto the **Title bar** of the window

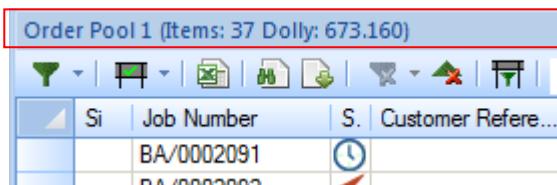


Figure 210

2. Drag the **window** over to the centre of the ESP window
3. Dock Arrows (positioning markers) will be displayed on the screen
4. Move the mouse pointer over one of the dock arrows (shading will be visible on the screen to indicate the new position of the window)

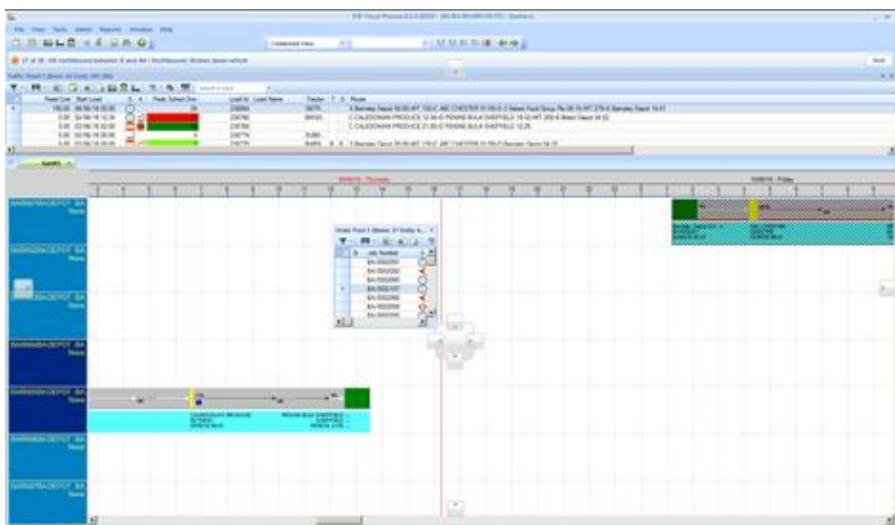


Figure 211

The Dock arrows  on the screen indicate where the window will be positioned. The central dock points perform the same function as the outer dock arrows and are there to make repositioning windows easier.

5. Release the mouse button to move the window
6. The window will be positioned as required

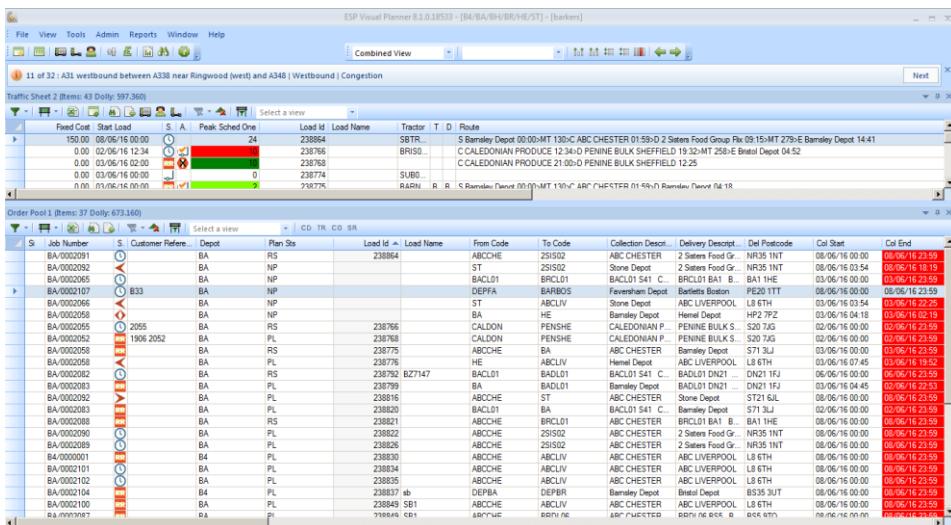
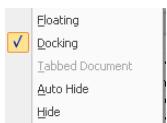


Figure 212

The order Pool window will be repositioned as required

Floating Windows

The Right Click menu available on any ESP window enables windows to be Docked, Floated, Hidden or Auto-hidden.



Display the window to be Floated

1. Right click on the **Title bar** area of the window
2. Click Floating

Hiding Windows

1. Click on the **Title Bar** and drag the window to the new location
2. The window can be hidden if required
3. Right click on the **Title bar** area of the window
3. Click **Hide** (note this performs the same function as closing the window)
4. Once windows have been hidden they can be re-displayed by clicking on the window option from the menu.

Auto Hiding Windows (Docked windows only)

The Auto Hide function in ESP allows windows to be temporarily hidden to allow more of the Gantt chart to be displayed. The window will minimise itself in the Auto Hide area of ESP, this will be on the same side that the window was originally docked.

1. Right click on the **Title bar** area of the window
2. Click 
3. Alternatively click on the **Auto Hide** pin 

The Auto Hide area of ESP will now be visible as a new shaded area either at the top, right, left or bottom of the screen. The window will be displayed as a tab, clicking on the tab will redisplay the window.

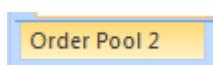


Figure 213

Redisplay the window

1. Move the mouse pointer on to the tab for the window
2. The window will be re-displayed
3. As soon as the Gantt or another window or menu option is selected the window will auto hide.

Re-dock the window

1. Move the mouse pointer on to the tab for the window
2. The window will be re-displayed
3. Click on the push pin  at edge of the window

Adding/Removing/Rearranging Column Headings in Windows

The columns of information displayed in any of the ESP windows can be customised if required. Columns can be added / removed, or re-ordered if required.

Moving Columns

1. Click on  (this is located in the top left hand corner of the order Pool)

The Column Headings window is displayed

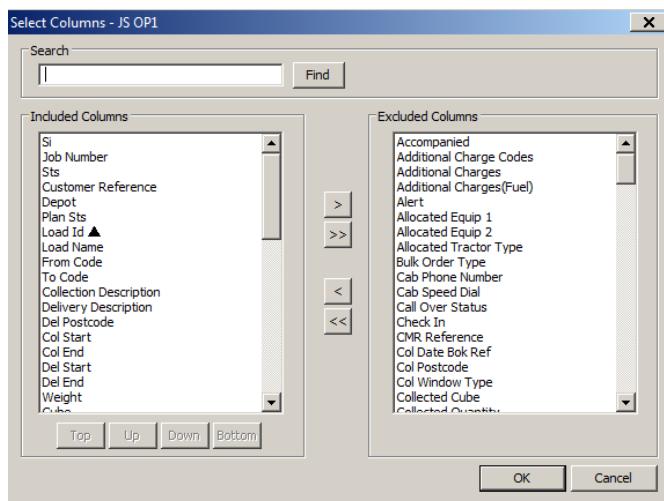


Figure 214

2. From the Included columns section on the right
3. Click the Column Name that is going to be moved
4. Click on **Up** or **Down** to move the column either up or down in the list
5. Alternatively:
6. Click either **Top** or **Bottom** to move the column to the top or bottom of the list

Display or Hide a column

1. Select the Column, then Click on the arrows in the centre of the window to move the column from the Included or Excluded Sections
2. Click **OK** to confirm the changes

Note: More than one column name may be selected and moved at the same time by using control and click to select or deselect multiple columns.

Application Look and Toolbars

Change Application Look

View Options

ESP can be customised to display the Gantt and associated windows in a variety of Window styles.

1. Click **View** from the menu
 2. Click Application Look
 3. Select from one of the following options:



Toolbars

The toolbars available in ESP are **Main** and **Gantt**.

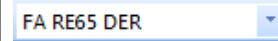
Show or Hide Toolbars

From the Menu:

1. Click View, Toolbars
2. Click on the **Toolbar name** to either show or hide the relevant toolbar

Gantt Chart Toolbar

The Gantt chart toolbar has four view options (for more information on the options from the drop down list see the planning section of this guide) and six spacing movement buttons:

 Block View	Click the drop down arrow to switch the Gantt Chart view to either Block View, Combined View, Detail View or Empty Running view (empty running blocks are shaded in this view)
 FA RE65 DER	Click the drop down arrow, select a vehicle, the Gantt chart will be positioned to the vehicle.
	Decrease Gantt Horizontal Spacing
	Increase Gantt Horizontal Spacing
	Decrease Gantt Vertical Spacing
	Increase Gantt Vertical Spacing
	Reset Gantt Chart Spacing back to System Defaults and move to the current Date and Time
	Shift Gantt 24 hours Earlier
	Shift Gantt 24 hours Later

Main Toolbar

The buttons on the Main Toolbar are covered in the relevant sections in this guide.



Moving and Customising Toolbars

The **Main** and **Gantt** toolbars can be positioned at different points within the ESP window. In addition, buttons can be added or removed from toolbars and User Defined toolbars can be created if required.

Show or Hide Toolbars

1. Click **View** from the menu, Click Toolbars

To show or hide the relevant toolbar:

2. Click Main or, Click Gantt

3. Move Toolbars

Toolbars can be positioned at the top, left or right hand side of the ESP window, alternatively they can be floated on the screen.

4. Move a toolbar to the top, right or left hand side of the window:

5. Locate the movement area of the toolbar: 

6. Click and drag the mouse pointer to the required position (Top, Left or Right of screen)

Float a Toolbar:

Locate the movement area of the toolbar: 

1. Click and drag the toolbar on to the Gantt chart or Order Pool window
2. To move the toolbar back to the top, left or right hand side of the screen
3. Click on the Title bar and drag the window to the position required

Add or Remove Buttons from a Toolbar

Ensure the toolbar to be customised is visible in ESP

1. Click on  at the end of the toolbar
2. Click the Toolbar name e.g. Gantt

Available buttons for the toolbar are displayed. Buttons with a tick beside them are visible on the toolbar; buttons without the tick are not.



Figure 215

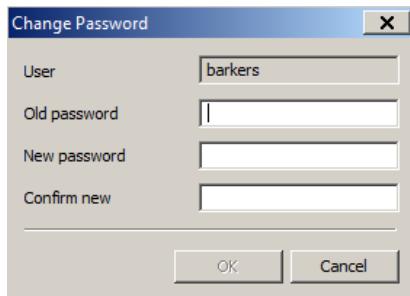
3. Click on the relevant toolbar button to either show or hide the button from the toolbar

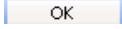
Passwords

Changing Passwords

From the Menu:

1. Click **Tools**, 



2. Old Password, Key in existing password (passwords are case-sensitive)
3. New Password, Key in the New Password
4. Confirm New, Key in the New Password again
5. Click 

The Password Success dialog will be displayed



Preferences

Changing Preferences

The change preferences window enables the default unit of measure of distance to be changed at user level (either Miles or Kilometres)

From the Menu:

1. Click Tools, [Preferences](#)

The Change Preferences window is displayed:

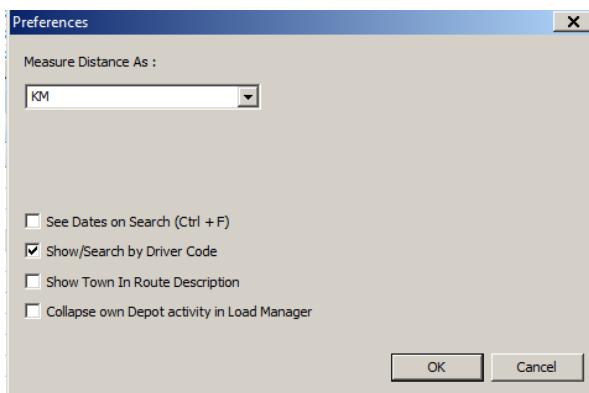


Figure 216

2. Measure Distance in, Select either KM or Miles.
3. See Dates on Search, Note – Not Applicable in this version of ESP.
4. Show/Search by Driver Code – Select to display Driver Code instead of Driver Name in the Order Pool, Traffic Sheet and Supplier Bin.
5. Show Town in Route Description, Select this option to display the Town in the Route Field on the Traffic Sheet.
6. Collapse own Depot activity in Load Manager, Select this option to either expand or collapse the Start and End leg details in the Load Manager (applicable to Load Manager Group View only)

Appendix A - Available Columns

Note: *Window Column, OP (Order Pool), LM (Load Manager). TS (Traffic Sheet), SU (Supplier Bin)

Field Name	Description	ESP Module	Window*			
			O	L	T	S
P	M	S	U			
Accompanied	Yes indicates the load is accompanied by the driver on a ship or rail leg	International	Y	Y	Y	Y
Action	Col (Collection) or Del (Delivery) the action taking place at this stop - in addition, L indicates Load, P indicates Pickup, U indicates Unload, D indicates Drop - Times for these actions can be set in the location master file	Base	N	Y	Y	N
Actual Time	Actual Planned Arrival Time at the Stop	Base	N	Y	Y	Y
Additional Charge Codes	Displays the Additional Charge Codes relating to the charge		Y	Y	Y	Y
Additional Charges	Displays the Additional charges for the job		Y	Y	N	N
Additional Fuel Charges	Displays the Additional Fuel Charges for the job		Y	Y	N	N
Additional Distance	N/A Config					
Alert	Orange Symbol indicates a Minor alert, Red Symbol indicates a Major Alert	Base	Y	Y	Y	Y
Alert Accepted	✓ Indicates that an Alert has been accepted	Base	N	Y	Y	N
Allocated Driver	Displays Allocated Driver Resource	Base	Y	Y	Y	Y
Allocated Equip1	N/A – Config		Y	Y	Y	Y
Allocated Equip2	N/A – Config		Y	Y	Y	Y
Allocated Tractor	Displays Allocated Tractor	Base	Y	Y	Y	Y
Allocated Tractor Type	Displays Allocated Tractor Type	Base	Y	Y	Y	Y
Allocated Trailer	Displays Allocated Trailer	Base	Y	Y	Y	Y
Available From	N/A Config					
Barrel Number	N/A Config					
Book Ref	Displays the booking reference for the job	Base	Y	Y	Y	Y
Book Time	Displays the booking in Time for the Job	Base	N	Y	Y	N
Bulk Order Type	N/A Config		Y	Y	N	N
Cab Phone Number	Displays the Cab Phone Number from the Tractor Master file		Y	Y	Y	Y
Cab Speed Dial	Displays the Cab Speed Dial Number from the Tractor Master file		Y	Y	Y	Y
Call Over Status	Displays Provisional or Confirmed for the Call over status	Base	Y	N	Y	Y
Capacity Four	Displays					
Capacity One	N/A Config					
Capacity Three	N/A Config					
Capacity Trailer Type in	N/A Config		N	Y	N	N
Capacity Trailer Type Out	N/A Config		N	Y	N	N
Capacity Two	N/A Config					
Carrying Class	displays the Carrying Class of the Job	Base	Y	Y	N	N
Check in	Displays the Check in Time for the ship/rail route	International	Y	N	Y	Y

Field Name	Description	ESP Module	Window*			
			O	L	T	S
			P	M	S	U
CMR Ref	Displays the CMR Reference for the Job	International	Y	N	Y	Y
Col code	Displays the Collection Location Code	Base	Y	Y	Y	Y
Col County	Displays the Collection Location County	Base	Y	Y	Y	N
Col Date Book Ref	Displays the Collection Booking reference	Base	Y	Y	N	N
Col End	Displays the Collection window end date	Base	Y	Y	N	N
Col Opening 1	Displays the Opening 1 time from the Location master file	Base	Y	N	N	N
Col Opening 2	Displays the Opening 2 time from the Location master file	Base	Y	N	N	N
Col Post Code	Displays the Postcode from the Location Master File	Base	Y	Y	N	N
Col Ref	Displays the Collection Reference from the Job	Base	Y	Y	Y	Y
Col Start	Displays the Collection window start time	Base	Y	Y	N	N
Col TA	Displays the Collection Traffic Area from the Location Master File	Base	Y	Y	N	N
Col Town	Displays the Collection Town from the Location Master File	Base	Y	Y	Y	Y
Col Window Type	Displays the Window Type from the Location Master File (I = Inclusive, D= Daily)	Base	Y	Y	N	Y
Collected Cube	Cube of the Collected Quantity	Base	Y	N	N	N
Collected Quantity	Collected Quantity	Base	Y	Y	Y	N
Collected Shed 1	Scheduling Equivalent 1 of the Collected Quantity	Base	Y	N	N	N
Collected Shed 2	Scheduling Equivalent 2 of the Collected Quantity	Base	Y	N	N	N
Collected Weight	Weight of the Collected Quantity	Base	Y	N	N	N
Collection Actual Arrival	Displays the Actual Arrival time of the collection	Base	Y	Y	N	N
Collection Actual Departure	Displays the Actual departure time of the Collection	Base	Y	Y	N	N
Collection Confirmed	Displays ✓ if the Collected Quantity has been confirmed	Base	Y	Y	N	N
Collection country	Displays the Collection County from the Location Master File	Base	Y	Y	Y	Y
Collection Description	Displays the Collection Description from the Location Master file	Base	Y	Y	Y	N
Collection Sequence	Displays the Sequence number for the collection in the load	Base	Y	Y	Y	N
Collection TAG	Displays the Collection Traffic Area Group (TAG)	Base	Y	N	N	N
Commodity Add Info	Displays Commodity Level Additional Information for the job (GTS Job Details, Commodity level Additional information)	Base	Y	Y	Y	Y
Commodity Code	Displays the Commodity code from the job	Base	Y	Y	Y	Y
Commodity Desc	Displays the Commodity description from the job	Base	Y	Y	Y	Y
Container No	Displays the Container Number	Container and Restitution Points Module	Y	Y	Y	Y
Controlling Depot	Displays the Controlling Depot for the Load	Base				Y
Cost	Displays the Running Cost for the Job (details are taken from the Tractor Type running costs and driver pence per hour)	Base	Y	Y	Y	Y
Cube	Displays the Cube of the Job	Base	Y	Y	Y	N
Cumulative Sched1	Displays the Cumulative value of Scheduling Equiv 1	Base	N	Y	N	N
Cumulative Weight	Displays the Cumulative weight of the load	Base	N	Y	N	N
Current Leg Stage	Displays the current leg stage	Base	Y	Y	Y	Y

Field Name	Description	ESP Module	Window*			
			O	L	T	S
			P	M	S	U
Current Leg Type	Displays the Current leg type	Base	Y	Y	Y	N
Current Trailer	N/A - Config					
Cust Ref	Displays the Customer Reference	Base	Y	Y	N	Y
Customer Code	Displays the Customer Code	Base	Y	Y	N	Y
Customer Name	Displays the Customer Name	Base				
Debrief Stage 1	Displays a tick ✓ to indicate that Debrief has been completed	Base	Y	Y	Y	Y
Del Code	Displays the Delivery Location Code	Base	Y	Y	Y	Y
Del County	Displays the Delivery Location County	Base	Y	Y	Y	N
Delivery Cycle	Display the Delivery Cycle	Base	Y	Y	Y	Y
Del Date Book Ref	Displays the Delivery Booking reference	Base	Y	Y	Y	N
Del end	Displays the Delivery window end date	Base	Y	Y	Y	N
Del opening 1	Displays the Opening 1 time from the Location master file	Base	Y	Y	Y	N
Del Opening 2	Displays the Opening 2 time from the Location master file	Base	Y	Y	Y	N
Del Postcode	Displays the Postcode from the Location Master File	Base	Y	Y	Y	N
Del Ref	Displays the Delivery Reference from the Job	Base	Y	Y	Y	Y
Del Start	Displays the Delivery window start time	Base	Y	Y	Y	N
Del TA	Displays the Delivery Traffic Area from the Location Master File	Base	Y	Y	Y	N
Del Town	Displays the Delivery Town from the Location Master File	Base	Y	Y	Y	N
Del Window Type	Displays the Window Type from the Location Master File (I = Inclusive, D= Daily)	Base	Y	Y	Y	N
Delivery Actual Arrival	Displays the Delivery Actual Arrival	Base	Y	Y	N	N
Delivery Actual Departure	Displays the Delivery Actual Departure	Base	Y	Y	N	N
Del Country	Displays the Delivery County from the Location Master File	Base	Y	Y	Y	Y
Delivery Description	Displays the Delivery Description from the Location Master file	Base	Y	Y	Y	N
Delivery ETA	N/A - Config		Y	N	Y	Y
Delivery Sequence	Displays the Sequence number for the collection in the load	Base	Y	Y	Y	N
Delivery Planned Arrival	N/A – Config		Y	N	Y	Y
Delivery TAG	Displays the Delivery Traffic Area Group (TAG)		Y	N	N	N
Despatch Time	Displays the Despatch Date and Time for the Load	Base	Y	Y	Y	Y
Destination Depot	Displays the Destination depot for the Trunk	Base	N	Y	Y	Y
Distance to Next Location	Displays the Distance to the next Location (Miles or KMs) population is dependent upon tracking system	Base	Y	N	Y	Y
Driver Arrived	N/A Debrief (Config)		N	N	Y	Y
Driver In	N/A Debrief (Config)		N	Y	N	N
Driver Informed	Driver has been marked as informed – Yes or No (resets to ?)	Base	N	Y	Y	Y
Driver Out	N/A Debrief(Config)		N	Y	N	N
Driver Resource Pool	Displays the Driver Resource Pool	Base	Y	Y	Y	Y
Drop Off Pin Number	Displays the Drop Off Pin Number	Base	N	Y	N	Y

Field Name	Description	ESP Module	Window*			
			O	L	T	S
P	M	S	U			
Drop Off Restitution	Displays the Location of the Drop Off Restitution	Base	Y	Y	Y	Y
Drop Off VBS Number	Displays the Drop Off VBS Number	Container and Restitution Points Module	N	Y	N	Y
Empty End Leg Distance	Displays the Empty End Leg distance	Base	N	N	Y	Y
Empty Start Leg Distance	Displays the Empty Start Leg distance	Base	N	N	Y	Y
Equip Type	Displays the Equip Type allocated to the Job	Base	Y	Y	Y	Y
Exported	N/A Config		Y	Y	Y	Y
FD Address Description	Displays the Final Delivery Address Description of the Job (relevant when a job is Legged)	Base	Y	Y	N	N
FD Post Code	Displays the Final Delivery Postcode of the Job (relevant when a job has been Legged)	Base	Y	Y	N	N
FD Town	Displays the Final Delivery Town of the Job (relevant when a job has been Legged)	Base	Y	Y	N	N
FD County	Displays the Final Delivery County of the Job(relevant when a job has been Legged)	Base	Y	Y	N	N
Final Delivery	Displays the Final Delivery Code of the Job (relevant when a Job has been Legged)	Base	Y	Y	Y	N
Final Delivery Country	Displays the Final Delivery Country of the Job (relevant when a Job has been Legged)					
First Location Book Time	Displays the First Location Booking Time	Base	N	Y	Y	Y
First Location Name	Displays the First Location Name	Base	N	Y	Y	Y
First Location Post Code	Displays the First Location Post Code	Base	N	Y	Y	Y
First Location Town	Displays the First Location Town	Base	N	Y	Y	Y
Fixed Cost	Displays details of Fixed Cost	Base	Y	Y	Y	Y
First Location Town	Displays the First Location Town	Base	N	Y	Y	Y
Fridge	✓ Indicates the Fridge is On	Chilled	Y	N	Y	Y
Groupage Job No	Displays the GTS Groupage Job Number for the Load	Base	N	N	Y	Y
Haz	Displays Hazardous information held against the job	Base	Y	Y	Y	N
Home Base	Displays the Vehicle Homebase	Base	N	N	Y	N
Inbound Load Fill	Total pallets for all activity planned after the last delivery point where the legs finish at a depot.	Base	N	N	Y	Y
Internal Cost	Displays the Internal Cost	Base	Y	Y	Y	Y
Internal Revenue	Displays the Internal Revenue	Base	Y	Y	Y	Y
Invoiced	Displays ✓ to indicate a job on the load has been Authorised for Invoicing (Amber Tick) or Invoiced (Green Tick)	Base	Y	Y	Y	Y
Job Count	Displays the Total Number of Jobs in the Load	Base	Y	Y	Y	N
Job Type	Displays the Job Type of the Order	Base	Y	Y	Y	N
Last Location Book Time	Displays the Last Location Booking Time	Base	Y	Y	Y	N

Field Name	Description	ESP Module	Window*			
			O	L	T	S
P	M	S	U			
Last Location Name	Displays the Last Location Name	Base	N	Y	Y	Y
Last Location Postcode	Displays the Last Location Post Code	Base	N	Y	Y	N
Last Location Town	Displays the Last Location Town	Base	N	N	Y	Y
Last Shift	Displays the Last Driver Shift (Debrief)	Base				
Leg Pair Id	Displays a number representing the number of stops in the load, legs that belong to the same job will have the same leg pair id number	Base	N	Y	Y	N
Leg Status	Displays the status of the leg in the load	Base	N	Y	Y	N
Load Duration	Displays the Total Duration of time for the Load	Base	N	N	Y	N
Load Finish Time	Displays the Load Finish Date and Time	Base	N	N	Y	Y
Load Number	Displays the Load ID	Base	Y	N	Y	Y
Load Plan Sent	N/A Config		Y	Y	Y	Y
Load Start Date	Displays the Load Start Date and Time	Base	N	N	Y	Y
Load Status	Displays the Status of the load	Base	N	Y	Y	N
License	Licence Category from the GTS Driver Master File (Resource window in ESP)	Base	N	N	N	N
Load Type	Displays the Load Type -Col/Del (Collection/Delivery) or Trk (Trunk)	Base	N	Y	Y	Y
Loaded	N/A – Config		N	N	Y	Y
Loaded Qty	N/A - Config					
Loading Plan Printed	N/A – Config		N	N	Y	N
Loading Sheet Printed	N/A - Config		N	N	Y	N
Magnox Ref	Additional Reference No for the Job					
Manual Debrief	N/A - Config		N	N	Y	N
Manual ETA Comments	Displays the Comments entered from the Manual ETA screen	Base	N	N	Y	Y
Margin	Displays the profit margin for the load (revenue minus cost)	Base	Y	Y	Y	Y
Minutes Late	Displays the number of Minutes the driver is running late after a Manual ETA entry has been recorded		N	N	Y	Y
Minutes Late Vs Plan, Vs Requested	Minutes Late Versus the Planned Time, Versus time Requested from customer (booking in window) works inconjunction with ETA from Tracker.	Base				Y
Name	Displays the Load Name	Base	Y	N	Y	Y
Next Leg Load Start Time	Displays the start time of the load the next leg is planned against	Base	Y	Y	N	N
Next Leg Stage	Displays the Stage of the next leg (relevant to trunks)	Base	Y	Y	Y	N
Next Leg Type	Displays the Leg Type of the next leg (relevant to trunks)	Base	Y	Y	Y	N
Next Location Book Time	Displays the booking in time for the next location	Base	N	Y	Y	Y
Next Location ETA	Displays the ETA for the Next Location	Base	N	N	Y	Y
Next Location Name	Displays the Name of the next Location	Base	N	Y	Y	Y
Next Location	Displays the PostCode of the next Location	Base	N	Y	Y	Y

Field Name	Description	ESP Module	Window*			
			O	L	T	S
Postcode			P	M	S	U
Next Location Town	Displays the Town for the next Location	Base	N	Y	Y	Y
Next Location Shift Start	N/A Config					
Night Out	Indicates if the load has a Night Out		N	Y	Y	Y
Non-conformance	Y/N to indicate a non-conformance has been recorded on the load	Base	Y	Y	Y	Y
Number	Displays the GTS Job Number	Base	Y	Y	Y	Y
Ordered Qty	Displays the Ordered Quantity from the Job	Base	Y	N	Y	N
Ordered Unit	Displays the Ordered Unit from the Job	Base	Y	N	Y	N
Original Collect Country	Displays the Collection Country for the Original Job	International	Y	Y	Y	Y
Original Collection	Displays the Start or Original Collection Location for the Load	Base	Y	Y	Y	N
Original Customer Ref				Y	Y	Y
Originating Depot	Displays the Depot the Job was Created in	Base	N	Y	Y	Y
	Total pallets for all activity planned up to the first delivery point on a route (including delivery legs from a depot, deliveries picked up on route, collections and trunk legs) This column shows total ordered Schedule equivalent 1 (Ordered Pallets)					
Outbound Load Fill		Base	N	N	Y	Y
Outbound Qty	N/A Config					
Overridden	Indicates if the load has had an override applied	Base	Y	N	Y	Y
Owning Depot	Displays the Depot that owns the Job	Base	N	Y	Y	N
Pallet ID's	Displays the Pallet ID's		Y	Y	N	N
Pallet Label Printed	Displays Y if a Pallet Label has been printed		Y	N	Y	N
Pallet Network	Indicates if the Order has been allocated to a Pallet Network	Base	Y	N	Y	Y
Parent Job	N/A Config					
Parent Status	N/A Config					
Peak Cube	Displays the Peak Cube for the Load (highest value)	Base	N	N	Y	Y
Peak Height	Displays the Peak Height for the Load (highest value)	Base	Y	Y	Y	Y
Peak Length	Displays the Peak Length for the Load (highest value)	Base	Y	Y	Y	Y
Peak Sched One	Displays the Peak Sched Equiv 1 for the Load (highest value)	Base	N	N	Y	Y
Peak Sched Two	Displays the Peak Sched Equiv 2 for the load (highest value)	Base	N	N	Y	Y
Peak Weight	Displays the Peak Weight for the Load (highest value)	Base	N	N	Y	Y
Peak Width	Displays the Peak Width for the Load (highest value)	Base	Y	Y	Y	Y
Pick-Up PIN Number	Displays the PIN number for the Pickup Restitution point	Container and Restitution Points Module	N	Y	N	N
Pick-Up Restitution	Displays the Pick up restitution point for the load	Container and Restitution Points Module	Y	Y	Y	Y

Field Name	Description	ESP Module	Window*			
			O	L	T	S
P	M	S	U			
Pick-Up VBS Number	Displays the VBS (seal) number for the load	Container and Restitution Points Module	N	Y	N	Y
Plan Address County	Displays the first delivery address county	Base	Y	Y	Y	N
Plan Address Description	Displays the first delivery address description	Base	Y	Y	Y	N
Plan Address Opening 1	Displays the first delivery address	Base	Y	Y	Y	N
Plan Address Opening 2	Displays the first Delivery Address Opening Times	Base	Y	Y	Y	N
Plan Address Postcode	Displays the first Delivery address postcode	Base	Y	Y	Y	N
Plan Address Town	Displays the first delivery address Town	Base	Y	Y	Y	N
Plan Lock	Indicates if the Plan is Locked (Config)		N	N	Y	Y
Plan Release Status	Indicates if the Plan has been Released	Chilled	N	N	Y	Y
Planned	Displays the planning status for the load	Base	Y	Y	Y	N
Planned Despatch	N/A – Config					
Planned Qty	N/A – Config					
Planning Depot	The Depot responsible for Planning the Load	Base	Y	Y	Y	Y
Planning Status	Displays the planning status for the load	Base	Y	Y	Y	N
POD Received	Displays Y if the POD has been recorded for the Order	Base	Y	N	Y	N
POD Signatory	N/A – Config					
Pre-Book Status	Displays the Pre-Book Status required for the job for Delivery. Green Symbols indicate the order has been booked in . Red symbols indicate the order has yet to be booked in  	Base	Y	Y	Y	Y
Pref Driver	Displays the Preferred Driver for the Load	Base	Y	Y	Y	Y
Pref Equip 1	N/A – Config		Y	Y	Y	Y
Pref Equip 2	N/A – Config		Y	Y	Y	Y
Pref Planning Depot	N/A – Config		Y	Y	Y	Y
Previous Leg Arrival Time	Displays the arrival time of the previous leg		Y	Y	N	N
Previous Leg Load Name	Displays the load name the previous leg was planned against		Y	N	N	N
Pref Supplier	N/A – Config		Y	Y	Y	N
Pref Tractor	Displays the preferred Tractor for the Load	Base	Y	Y	Y	Y
Pref Trailer	Displays the preferred Trailer for the load	Base	Y	Y	Y	Y
Previous Leg Stage	Displays the Stage of the previous leg (applicable to local collections/trunks etc.)	Base	Y	Y	Y	N
Previous Leg Type	Displays the Leg Type of the Previous leg (applicable to local collections/ trunks etc.)	Base	Y	Y	Y	N
Previous Stop Arrival	Displays the Arrival Time at the Previous Stop	Base	N	N	Y	Y

Field Name	Description	ESP Module	Window*			
			O	L	T	S
			P	M	S	U
Previous Stop Departure	Displays the Departure Time from the Previous Stop	Base	N	N	Y	Y
Purchase Order No	Displays the Purchase Order number if entered in GTS	Base	Y	Y	Y	Y
Rate Confirmed	Displays if the Leg has been Rate Confirmed, Authorised for Rate Confirmation in GTS	Base	Y	Y	Y	Y
Release	Displays the release time of the load from the Rail/Ship terminal	International	Y	N	Y	Y
Reports Printed	N/A Config		N	N	Y	Y
Return/Redelivery	Indicates if the Job is a return or redelivery	Base	Y	Y	Y	Y
Revenue	Displays the revenue for the job	Base	Y	Y	Y	Y
Route Code	Displays the Route Code from Base Repeat Schedule	Base	Y	N	N	N
Route Date	N/A – Config					
Route End	N/A – Config					
Route Equip Type	N/A – Config					
Route Link Id	N/A – Config					
Route Name	N/A – Config					
Route Start	N/A – Config					
Route Summary	The Route summary field displays details of the route for the load including empty start and end legs	Base	N	N	Y	Y
Sched 1	Displays Scheduling Equivalent 1	Base	Y	Y	Y	N
Sched 2	Displays Scheduling Equivalent 2	Base	Y	Y	Y	N
Sent	N/A - used for bespoke interfaces		Y	Y	Y	Y
Sent At	N/A - used for bespoke interfaces		Y	Y	Y	Y
Shadow Tariff	Displays the Shadow Tariff for the Load		Y	Y	Y	Y
Shipper	Displays the Shipper Code	Chilled Module	Y	Y	Y	Y
Shipper Name	Displays the Shipper Name	Chilled Module	Y	Y	Y	Y
Shipping Route	Displays details of the Ship or Rail route	International	Y	Y	Y	Y
Span	Displays the Date range the load spans	Base	Y	Y	Y	Y
Special Instruction	Indicates if special Instructions have been included on the Job/Load	Base	Y	Y	Y	N
Special Requirement	Indicates if special requirements have been included on the Job/Load	Base	Y	Y	Y	Y
Spot Cost	Indicates if the Load has a spot cost (supplier payment)	Base	Y	Y	Y	Y
Stop	Displays the location of the Stop	Base	N	Y	Y	N
Stop Arrival	Displays the Stop arrival time	Base	N	Y	Y	N
Stop Booking Ref	Displays the stop booking reference	Base	N	Y	Y	N
Stop Count	Displays the number of jobs at the Stop	Base	N	N	Y	Y
Stop County	Displays the Stop county	Base	N	Y	Y	N
Stop Departure	Displays the stop departure time	Base	N	Y	Y	N
Stop Name	Displays the name of the stop location	Base	N	Y	Y	N
Stop Opening 1	Displays the Stop Opening 1 time	Base	N	Y	Y	N
Stop Opening 2	Displays the Stop Opening 2 time	Base	N	Y	Y	N
Stop PostCode	Displays the Stop Postcode	Base	N	Y	Y	N
Stop Time	Displays the Time at the Stop	Base	N	Y	N	N

Field Name	Description	ESP Module	Window*			
			O	L	T	S
			P	M	S	U
Stop Town	Displays the Stop Town	Base	N	Y	Y	N
Sts	Displays the Status Icon for the Job	Base	Y	Y	Y	Y
Subcontractor	Displays the Name of the Subcontractor allocated to the Load	Base	N	Y	Y	Y
Sup Notification Sent	N/A Config					
Supplied Qty	N/A Config					
Supplier Driver Name	Displays the Subcontractor driver name - entered via supplier details from the traffic sheet or supplier bin	Base	N	N	Y	Y
Supplier Driver Phone	Displays the Subcontractor driver Phone number - entered via supplier details from the traffic sheet or supplier bin	Base	N	N	Y	Y
Supplier Vehicle Reg	Displays the Subcontractor vehicle registration number- entered via supplier details from the traffic sheet or supplier bin	Base	N	N	Y	Y
Temperature Category	Displays the temperature category of the job	Chilled	Y	Y	Y	Y
Temperature Required	N/A - Config					
Template Customer	N/A – Config		Y	N	N	N
Terminal Leg Status	Displays <, > or <> to indicate if the load has no start/end leg or both. Also indicates positioning leg mismatch	Base	N	N	Y	N
Total Cost	Displays Total Cost for the Order/Load	Base	Y	Y	Y	Y
Total Delay	Displays the Total Delay time for the load		N	N	Y	Y
Total Distance	Displays the Total Distance for the Load		N	N	Y	Y
Trailer Out	Displays the Trailer Out	Base	N	Y	N	N
Trailer In	Displays the Trailer In	Base	N	Y	N	N
Trailer Resource Pool	Displays the Resource Pool for the Trailer	Base	Y	Y	Y	Y
Travel Distance	Displays the Travel Distance	Base	N	Y	N	N
Tractor Type	Displays the Tractor Type details on the job	Base	Y	Y	Y	N
Travel Time	Displays the travel time for the job	Base	N	Y	N	N
Trip Category	Displays the Trip category of the load	Base	Y	Y	Y	Y
Trip Type	Displays the Trip type of the load	Base	Y	Y	Y	Y
Trip Instructions Memo	Displays a Tick if a load has Trip Instructions	Base	N	N	Y	Y
Trip Instructions Note	Displays the Trip Instructions Note Text	Base	N	N	Y	Y
Trip Memo	Displays a Tick if a load has a Trip Memo recorded	Base	N	N	Y	Y
Trip Note	Displays the Trip Note Text	Base	N	N	Y	Y
Trunk Arrival	Displays the arrival time of the trunk into the receiving depot	Base	N	Y	Y	N
Trunk From	Displays details of the depot the trunk is departing from	Base	N	Y	Y	N
Trunk To	Displays details of the depot the trunk is going to	Base	N	Y	Y	N
Voyage Reference	Details the Voyage reference on the job	International	Y	N	Y	Y
Weight	Displays the weight of the job	Base	Y	Y	Y	N

Appendix B - Order Pool, Traffic Sheet Icons & Gantt Shading

	Order Pool/Traffic Sheet/Load Manager	Order doesn't have a window for Collection or Delivery
	Order Pool/Traffic Sheet/Load Manager	Order has a Time window for Collection/Delivery or Both
	Order Pool/Traffic Sheet/Load Manager/Supplier Bin	Order/Load is locked by another user or system process
	Order Pool /Load Manager/Supplier Bin	Order is locked pending a refresh
	Order Pool/Traffic Sheet/Load Manager	Load has a Route, without any skeletal stops
	Order Pool/Traffic Sheet/Load Manager	Load with Skeletal Stops
	Traffic Sheet/Load Manager	Partial Skeletal Route
	Order Pool/Traffic Sheet	Collection Leg
	Order Pool/Traffic Sheet	Mid (Trunk) Leg
	Order Pool/Traffic Sheet	Delivery Leg
	Order Pool/Traffic Sheet/Supplier Bin	Spot Cost Required
	Order Pool/Traffic Sheet/Supplier Bin	Spot Cost Present
	Order Pool/Traffic Sheet	Special Instructions present
	Order Pool/Traffic Sheet	Load has an Invalid Route
	Order Pool/Traffic Sheet	Special Requirements present
	Traffic Sheet	Rail Leg
	Traffic Sheet	Shipping Leg
	Order Pool/Traffic Sheet	Review Route
	Load Manager	Minor Alert
	Load Manager	Major Alert
	Order Pool/LM/Traffic Sheet	Minor Alert (Alert column)
	Order Pool/Traffic Sheet	Empty Load (no stops)
	Order Pool/LM/Traffic Sheet	Green Tick (Various uses Invoiced/RCN/Debrief)
	Order Pool/LM/Traffic Sheet	Red Tick (Various uses Invoiced/RCN/Debrief)

	Order Pool/LM/Traffic Sheet	Major Alert (Alert column)
	Order Pool/LM/Traffic Sheet	Pre- Book Status Collection Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Collection Not Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Delivery Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Delivery Not Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Collection\Delivery Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Collection\Delivery Not Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Collection Booked \Delivery not Booked
	Order Pool/LM/Traffic Sheet	Pre- Book Status Collection Not Booked \Delivery Booked
	Load Manager	Critical Alerts Present
	Order Pool /Traffic Sheet/Supplier Bin	Filter Applied (Blue Filter)
	Order Pool /Traffic Sheet	Load Locked to prevent planning changes (Config Setting)
	Traffic Sheet	Terminal Leg Status (TLS) Column Load Lacks required start and end leg
	Traffic Sheet	Terminal Leg Status (TLS) Column Load Lacks required start leg
	Traffic Sheet	Terminal Leg Status (TLS) Column Load Lacks required end leg
	Traffic Sheet	Actual times recorded not debriefed (Debrief Stage 1 Column)
	Traffic Sheet/Supplier Bin	Supplier Rate applied to load
	Traffic Sheet/Load Manager	Night Out
	Traffic Sheet/Load Manager	Debriefed not Completed (Config setting for Debrief Stage 1 column)
	Traffic Sheet/Load Manager	Load Not Required

Gantt Chart

Shading	Description
	Load with a Major Alert (Red Cross Hatch Shading)
	Completed/Debriefed Load (Black Diagonal Shading)

Appendix C - Load Manager Columns that can have Alert/Override/Issue implications

The following columns in Load manager can have Overrides applied which in turn will effect/change the Alert status of the Load.

Column	Description
Travel Time	Override available
Stop Time	Override available
Stop Arrival	Override available
Stop Departure	Override available
Dolly (sched 1)	Override available
Pallets (sched2)	Override available

The Columns below indicate Alerts and Overrides

Alert	Indicates if the leg has an Alert
Alert Accept	Indicates if the leg has had an Alert accepted (Minor alerts only)
Overridden	Indicates if the leg has been overridden

A

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