DESIGNING A PROCESS GUIDELINE AND IMPROVING PROCESSES

by

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Executive Summary

The aim of this report is to provide the reader information about the BPJ 420 year project. A company is selected and problems within the company are identified. The student is required to solve these problems with the knowledge obtained from his/her 4 year Industrial Engineering study course.

Fast ‘n Fresh (FnF) is a leading transport service provider in the Fast Moving Consumer Goods (FMCG) industry. The business was founded in 1992 with only 4 vehicles and has increased up to 200 vehicles in 2007. They are currently still operating at this number of vehicles. Woolworths, their largest customer represents 78% of their services, whereas the other 12% are represented by companies for example, Rainbow and Tiger Brands.

Because Woolworths and FnF work in close partnership to improve performance and processes, Woolworths approached FnF and requested that they introduce a Business Excellence Charter (BEC) into their business. The BEC is a mean to improve business performance within a company.

The problem of the project is described as FnF wanting the student to document their business processes and compile a process manual which can be used for training purposes. In the light of documenting these processes the student must also identify processes which can be improved and give recommendations for improvement.

A literature review was done to study methods and techniques to solve this problem. The best methods to solve this problem were then selected and used to design a solution. A combination of techniques was used to develop a problem solving method for the problem at FnF. This method includes a Capability Maturity Model, Business Process Management and Process modelling tools.

This developed method was then used to solve the problem. The outcome of the solution is also discussed in the report.

To conclude, the problem identified at FnF can now be approached and solved with the problem solving method designed by the student.
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Chapter 1

Introduction

1.1. Background

Fast ‘n Fresh (FnF) is a leading transport service provider in the Fast Moving Consumer Goods (FMCG) industry. They provide controlled, multi-temperature, cost effective distribution services to meet the stringent cold chain and food safety standards of the FMCG market. FnF provides their services to companies like Woolworths, Cadbury, Dairy belle, Rainbow and Tiger brands. They aim to deliver goods on time, at the right temperature, and in the right condition.

The business was founded in 1992 in Cape Town, starting with only 4 vehicles. The fleet has grown to a remarkable 100 vehicles in 1999 and then to 200 vehicles in 2007. They are currently still operating at this number of vehicles. In 1996 Imperial Logistics acquired a 65% stake in FnF and in 1999 they became a wholly owned subsidiary of Imperial. Figure 1 is a graphical representation of Imperial Holdings consisting out of Imperial Logistics and all the sub-services. It also demonstrates where FnF fits into the Imperial Holdings group.
FnF has depots in Cape Town, Centurion and Durban. The Head Office is located in Cape Town with a full service operations facility in Centurion and a Satellite Depot in Durban. The focus of this project will be based on the Service Operations Facility in Centurion. This facility was first situated in City Deep and has moved to the new Facility in Centurion in 2007.

Their biggest customer currently, is Woolworths representing 78% of the services rendered at FnF. The Woolworths contract has a division solely dedicated to them. This division is run by Frans Brand, the Operations Manager. The remaining 22% is allocated to other customers such as Tiger brands and Rainbow. Due to the fact that BEC is implemented in Woolworths with great success, Woolworths suggested that FNF copy the system to help enhance their delivery and performance. They supplied FnF with a proposed BEC (Figure 2) that will serve as a reference from which FnF will work.
Chapter 2

2.1. Project Aim

The aim of this project is to:

- Document the current processes that FnF use in the company.
- Focus on six processes and make improvements if possible.
- Use these processes to adhere to BEC requirements.
- Compile a User Manual from the documented processes which will be used for training purposes.

2.2. Problem Analysis

Woolworths is one of South Africa’s largest retail stores. They deliver to the top and of the market. FnF is their transport provider and because these two companies work in close partnership to improve processes Woolworths suggested that FnF implement the BEC into their company.

2.2.1. The Business Excellence Charter

A BEC is a document to which activity in a company is audited. This document consists out of 4 categories into which these activities are divided: Finance, Operations, Customers and People. These 4 categories then have sub activities and these sub-activities are then audited.

2.2.1.1. How the auditing process works:

Figure 2 illustrates the proposed BEC by Woolworths. This is an extract from the Operations category and it shows the sub activity of the processes that will be audited. It will be used to explain how the auditing works. For each sub-activity a goal is set. Requirements to reach this performance are then stated. Then there are indicators which are used for the scoring.
2.2.1.2. How the scoring process works:

Table 1 shows the scoring of the BEC:

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Requirement</th>
<th>Scoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Failed</td>
<td>The first of the indicators explain the reason of possible failure of reaching goal</td>
<td>A scoring of 0 will be given</td>
</tr>
<tr>
<td>Process</td>
<td>Certain goals are set to achieve performance excellence. Processes to achieve these goals need to be in place. This indicator will imply if there is a process to reach this goal</td>
<td>A scoring of 1 will be given if a process is in place</td>
</tr>
<tr>
<td>Implementation</td>
<td>This will indicate if a process is implemented</td>
<td>A score of 2 is given if the process is implemented.</td>
</tr>
<tr>
<td>Measurement</td>
<td>This indicates whether the implemented processes are measured or assessed.</td>
<td>A score of 3 is given if there is measurement of this process</td>
</tr>
<tr>
<td>Improvement (Plans)</td>
<td>This indicates which steps will be taken to improve the measurements taken of processes.</td>
<td>A score of 4 is given for improvement plans of this process.</td>
</tr>
<tr>
<td>Improvement (Results)</td>
<td>What are the results of the improvement that was taken.</td>
<td>A score of 5 is given if there is evidence of results for these improvements</td>
</tr>
</tbody>
</table>

Table 1: Scoring of BEC
The different indicators, requirements and the scoring which is given if the particular indicator is in place are illustrated by Table 1. The aim of the BEC is to get all the requirements in place to achieve a score of 5.

### 2.3. Problem description

FnF is busy getting all of these requirements in place in order to adhere to the requirements set in the BEC. Figure 2 (an extract from the BEC) shows the Operations category with a goal defined as: Process conformance and improvement. Thus the problem is identified as FnF wanting to improve processes in order to adhere to the requirements of the BEC.

Together with the improvements FnF also wants their processes documented. These documented processes must then be transformed into a manual which will assist employees of FnF to do all processes, even though they’re not trained to do so. The manual must also serve as a tool for training purposes.

The division run by Frans Brand is included in this project which is all the services given to Woolworths. There is in the region of about 50 processes to be documented.

### 2.4. Deliverables

With the completion of this project, processes at FnF must be documented and where possible improvement must be made and implemented. This documentation will be transformed into a Process Guideline. This manual will be used for training purposes.
Chapter 3

Literature Review

3.1. Introduction

This literature review consists of possible solutions in which the problem described can be resolved. The problem is that FnF wants to document and make possible improvements to all of their processes. The aim with documenting the processes is also to maintain a good standard of processes within the company. Only some processes are currently documented. All processes need to be codified and also be analysed and if there is any possibility of improvement of the performance of the processes, changes must be made and implemented.

Research was done on the methods and techniques that can be used to manage the processes and familiarise the students with techniques on how the processes can be documented. These methods will be useful in the solving of the current problem at FNF.

3.2. Possible Methods/Tools/ techniques to solve the problem

3.2.1. Business Process Management (BPM)

Computer Science Corporation (2002) defines a Business Process as a set of activities which gives value to the customer. The Business Process represents the end-to-end flow of materials, information and business commitments. A process can have both automated and manual activities.

Documenting processes has become an important initiative for many Organisations. The advantage that lies in identifying, understanding and evaluating key business processes to determine their effectiveness in meeting objectives set by a company has been recognised for some time. A common approach to capture information about business performance is by developing end-to-end process flow. End-to-end can have different meanings to different parts of an organisation. For the Head of Department it means to view a business process from the time it enters the Department until it is finished or handed to the next Department. For a Division Executive it might include all processes from all the Departments (Lusk, 2006).
BPM is defined as a disciplined approach to identify, design, execute, document, monitor and measure automated as well as non-automated business processes. This is to align resources to organisations strategic goals by achieving consistent targeted operational results. It involves defining, improving, innovating and managing end-to-end business processes that drive business agility. BPM is a method by which an enterprise aligns its processes to the strategy of the business. This then leads to optimisation of the overall company performance through improvements across specific departments or corporations (Lusk et al. 2005:5-6).

Jeston and Nelis (2006:50-51) developed a framework for the implementation of BPM.

1. **Organisation strategy.** This includes the understanding of vision, strategy, goals and business drivers of the organisation.

2. **Process architecture.** Process architecture is the way guidelines, models, rules and principles are established. Here Information Technology, Business architecture and processes align with the strategy of the organisation.

![BPM Framework](image-url)
3. **Launch Pad.** Here the team determines where to start with the BPM project. The project team also agree on goals and a vision for selected processes. This is then the establishment of the selected project.

4. **Understand.** This phase is about understanding the current business process environment. Because this phase leads to the next phase of Innovation, one needs to have the basic knowledge and understanding of how processes work before you can build upon them. Basic process metrics need to be gathered for establishment of process baseline costs for future comparative purposes.

5. **Innovate.** Simulations, complete activity-based costing, implementation feasibility are conducted on process options to finalise which of the options are best.

6. **Develop.** This entails the building of components of new processes for implementation. This can involve IT building or the building of Infrastructure to support the changes that affects the environment around the process.

7. **People.** The effectiveness and efficiency of the process relies on the people behind the process. This phase is to ensure that the activities, responsibilities, roles and performance measurement are in line with the organisation strategy and goals.

8. **Implement.** This is the role-out of new processes, new role descriptions, performance management, measures and training.

9. **Realise value.** The benefit outcomes which were outlined in the start of this project need to be realised. This phase is about the delivery of the benefit realisation management process and benefits realisation reporting. If the benefits are not realised no more funding should be spent on project.

10. **Sustainable performance.** This phase entail continuous process agility and improvement. (Jeston and Nelis,2006:53-55)

A small pharmaceutical manufacturer of multivitamins, antibiotics, syrups and OTC medicines for children, located in a large African city, also wanted to improve the processes in their company for better satisfaction to their customers. Samuel Okora is the CEO of Leapfrog Alliance Ltd, a consulting firm that helps organisations to improve quality and reduce costs through better business processes. According to Okora (2006) five steps to adopting a Business Process Approach can be done which can be related to services.
Before approaching these 5 steps customers identify the benefits they want delivered. Then the steps are approached:

1. *Determine the value chain that delivers the best benefits*

Benefit information can be formed into benefit clusters. These benefits are traced back from services through to the inputs. The identified path forms then your core processes.

2. *Decompose into processes and deliver the processes.*

Here the core processes and the sub-processes need to be determined. The processes are listed and each major process is broken down and then the sub-processes can be identified. This can be done using the following steps:

- Brainstorm the necessary results for the process
- Link processes so that the output of one forms the input of the next
- Note the steps within the relationships, one to one, one to many etc. All the one to one will form the sub-processes.

3. *Select appropriate metrics based on critical success factors for the identified processes and overall strategy.*

Choose critical factors that drive delivery of customer metrics and decide on performance indicators. Each of these indicators must have targets for measurement. There must be a line between the overall organisational measures and the detailed measures at process level.

4. *Appoint process owners for the core processes.*

The job of the process owner is to manage the critical areas of improvement

5. *Begin a never ending improvement cycle of business process improvement.*

With the use of certain techniques such as process diagrams, value maps and metrics areas of opportunity for improvement can be identified.
3. 2.2. The Value Chain

Every firm is a collection of activities that are performed to, design and market, deliver and support its product or service. These different activities can be represented by using a value chain. The value chain and the performance of the activities within an organisation reflect the organisations history and strategy, its approach to implement its strategy and the underlying economics of the activities themselves (Porter, 2004:36-48). Below is an example of a value chain.

![Value Chain Diagram]

Figure 4: Value Chain with Support and Primary activities

The Value Chain is divided into Support and Primary activities. Support activities include the:

Firm infrastructure: Including activities such as general management, planning management, legal, finance, accounting public affairs etc.

Human Resources (HR): Activities associated with recruiting, education, retention and compensation of employees and management.
Technology Development: Technology development to support the value chain activities such as design and research and development.

Procurement: The procurement of raw materials, servicing machines etc.

The Primary activities are:

Inbound logistics: Receiving, storing, inventory control and transportation scheduling.

Operations: Value creating activities that transforms the input into desired output.

Outbound Logistics: Activities required to get the output to the customer. (Order fulfilment, distribution management)

Marketing & Sales: Activities to sell product/service to customer. This includes advertisements, promotions and channel selection.

After sales service: Activities that enhance product or service value such as customer support and complaint resolution.

All activities a firm executes should be captured in a primary or support activity. When designing organisational structures, the value chain plays a valuable role. Certain activities are put together under organisational units, and these groupings are then combined together under a certain department because if similarities they have. (Porter, 2004:59)

3.2.3. Process mapping as a tool to document processes.

Process mapping is a workflow diagram which brings forth a clearer understanding of a process. The idea is to use diagrams to understand the processes that are currently used. Questions can be asked like: “What is expected of the process?” and “What should change give to have better customer focus?”

Ahoy (1999) illustrates how to construct a process flow chart with 7 steps.

1. Determine the boundaries.
   i. Where does the process begin?
   ii. Where does the process end?
2. List the steps.
   i. Use verbs to start task description.
      (One can show detailed descriptions or sufficient information to understand flow)

3. Sequence the steps.
   i. Use post it notes to move tasks around
   ii. Leave the arrows until later

4. Draw the appropriate symbols.

Figure 5: Symbols for flowcharts (Chris Ahoy, 1999)
5. System model.
   i. Draw chart using system model approach.
   ii. Input- Use information based on people, materials etc.
   iii. Process- Use subsets of processes.
   iv. Output- Use outcomes or desired results
   v. Control- Use best in class business results
   vi. Feedback- Information from surveys/feedback

6. Check for completeness.

7. Finalise flowchart
   i. Does process run the way it should?
   ii. Are people following it as charted?
   iii. Is there a consensus
   iv. What is redundant? Add what is missing.

3.2.4. Swim lane diagrams as a tool for mapping processes.

A swim lane diagram as illustrated if Figure X is a diagram where compound parts of processes are located on a lane according to who is responsible for that process. The same principle as process mapping described above can be followed in the case of the swim lane diagram. The outcome will just be in a different format.
3.2.5. Capability Maturity Model

The Capability Maturity Model (CMM) is a process improvement approach that provides organisations guidance to improve their performance. In this case it would be the process performance of FnF. (http://www.sei.cmu.edu/cmmi/)
Description of the levels of the CMM:

Level 1 (Initial): Processes are usually ad hoc. There is no stable environment to support the processes. The success of the processes depends on the competence of people in the organisation and not the use of proven processes. They deliver products and services that work but frequently exceed the budget.

Level 2 (Managed): Processes in the organisation are planned and executed in accordance with policy. Process disciplines that are reflected by level 2 ensure that existing practises are retained during times of stress. The product and services which are delivered satisfy the specific process descriptions and procedures they were developed for.

Level 3 (Defined): Processes are understood and characterised, and are described in standards, procedures, tools and methods. The standardised processes is established, improved over time and used to establish consistency across organisation.

Level 4 (Quantitatively managed): Quantitative objectives for quality and process performance are established. These objectives are used as criteria in managing processes. At level 4 the performance is controlled using statistical and other quantitative techniques and is quantitatively predictable.

Level 5 (Optimization): The organisation continually improves its processes based on a quantitative understanding of the common causes of variation inherent processes. The focus is on continuous process performance improvement through innovative incremental process and technological improvements. The organisation addresses common causes of variation and changes processes to improve process performance.
This tool can be effective in determining at what level the company is running presently. This will give the company a general idea on where they are now, and give indication if they need to take action to reach the next level, and in the future work it to level 5.

**3.2.6. Determining Metrics to test process performance.**

In order to improve a process, the process has to be measured to a specific standard or metric. Otherwise if there is no standard to compare the performance to the organisation they would not know if improvement was achieved. Jeston and Nelis (2006:134-135) gives examples of types of metrics which can be considered in measuring processes. These include:

- Process times for major processes, particularly date sensitive activities.
- Error numbers and types
- Volumes and values of various transaction types
- Overtime/casual/contract hours worked
- Labour cost for key positions
- Percentage of time spent on out of scope processes
- For quality or effectiveness measure the efficiency, adaptability, cost, and time and customer satisfaction.

**3.3. METHODS/TOOLS AND TECHNIQUES CURRENTLY USED AT FnF**

This implementation of the process guide is a part of the FnF strategy for 2010. They also have another project running, which is implementing a new transport management system. A user manual is also being developed for that system. There are no metrics to which they are measuring individual processes that are being documented, so there are no means to which improvement can be made or tested.
3.4. Methods and techniques that will be used

The CMM will be a technique to determine the levels of maturity within the project we are working at. This can indicate the direction project is aiming at.

BPM will be used for the documenting and the approach to the improvement of processes. A conceptual design will be developed from this methods studied in the literature review.

BizAgi Process modeller or Microsoft Visio can be used to document the processes.
Chapter 4

Conceptual Design

4.1. Methods and Techniques selected to develop a problem solving method

- The CMM will be used to indicate the level to which this project is aiming.
- BPM will be used to form a methodology by which the student will approach the solving of the problem.
- The Swim lane approach will be the technique used to make the flow diagrams for the processes.
- Technology to be used: BizAgi Process Modeller will be used to model the processes. Microsoft Word will be used for the final assembling of the User Manual.

4.2. Solution to documentation of processes

BPM will be the main problem solving tool for this project. Considering the framework of BPM by Jeston and Nelis (2006), only the first 4 levels, organisation strategy, process architecture, launch pad and understand, will be included for this project. Most focus is placed on the Understand level. By understanding all processes it is easy to document them as complete end-to-end processes

4.3. The developed steps

To solve the problem of documenting processes the work studied in the literature review were used to develop steps to understand and document processes. The steps are:

1. Determine the Value Chain
2. Decompose into processes

In this step the as-is processes will be identified and understood. How processes are done by operators will be written down. This entails the student to sit down with the operators and write down step by step the process which is executed.

3. Deliver Processes

This step will be a summary of the designing and modelling of the processes.

- Designing: How the layout of the processes will look

- Modelling: Sequence of processes actually done in BizAgI. Here Chris Ahoys’ (1999) illustration on how to construct a process flow chart will be taken into consideration.

  a) Boundaries will be determined.
     Where the process begins and where it ends.

  b) Steps of process will be listed
     Detailed descriptions will be used to describe tasks, and inserted into their appropriate symbols.

  c) Steps will be sequenced
     Steps will be organised in the way the process flows, and arrows will be used to indicate the direction of the flow.

  d) Check for completeness
     Make sure that there are no gaps in the processes.

4. Execution

Processes will be tested to see if the processes are followed as documented, and to see if any problems arise. (If Problems did arise, the step will be re-evaluated and the problem must be corrected)
The problem can be tested with operators that are unfamiliar with it.

5. Print the processes
   The processes will be transformed into a Process Guideline using Microsoft Word and then printed and combined.

   Process Guide will be handed to FnF for future usage.

4.4. Solution to approach for improvement of processes.

Processes need to be identified for improvement. Due to time constraints only 3 processes will be analysed to see if there is a possibility for improvement. The improvements will not be implemented due to time constraints. Processes identified for improvement and the metrics to which it will be measured, will be identified and recommendations to what can be changed will be given to FnF.

1. Processes which can be improved will be identified during the documentation of processes. While busy studying, understanding and documenting the student will be able to see if changes and improvements can be made. Those processes which can be improved will be marked and further studied can be done in order to see how improvements can be made. Not all the processes will be able to be improved because they are standard processes like capturing data on a system. It is impossible to change those sequences of that processes. This step is just to separate processes that can be improved from those that can’t.

2. Metrics to which processes can be measured will be determined.

3. Final processes for improvement will be selected.

4. Measurements will take place.

5. Recommendations for improvements will be given.
Chapter 5

Application of problem solving methods

5.1. Application of CMM.

With the knowledge gained from the literature study with regard to CMM, the aim of this project is to get FnF to be at level 3 which is described as: Processes are understood and characterised, and are described in standards, procedures, tools and methods. The standardised processes is established, improved over time and used to establish consistency across organisation. The aim is to get FnF to a level where all the processes are understood by everyone, and then to approach the improvement of these processes.
5.2. Application of problem solving method for documentation of processes

Following is a discussion of the BPM levels 1 - 4 that was used:

**FnF Strategy**

FnF exists to make our customers more competitive!

Included in their strategy for 2010, FnF are implementing a new system, the Transport Management System (TMS). They are also implementing the BEC mentioned in Chapter 1. The documenting and approach for process improvement are part of this strategy.

**Process architecture**

Principles and rules considering processes were established when processes were first implemented with the starting of the company. It is not necessary to determine principles or rules for processes because no new processes will be implemented. Rather the existing processes will be documented.

With the new TMS being implemented process architecture is covered by another project that is currently running at FnF. A user manual consisting of all processes relating to the TMS system are covered in this manual.

**Launch Pad**

The goal with this project is to conduct a process guideline, which consist of processes covered in the value chain. Then with all knowledge gathered from documenting these processes, an approach to improve these processes can be developed.

**Understand**

It s clear that the understand level are mostly about understanding the processes.
Following is the application of the developed steps for the understanding and documenting of the processes

1. Determine the Value Chain

![Figure 9: FnF Value Chain](image)

Processes to be documented are divided into four departments, HR, Administration, Operations and Workshop. When considering the Value Chain and these departments it was determined that the departments Administration goes under the Firm infrastructure, HR under HR, and Workshop and Operations under Operations.

2. Decompose into processes

The Value chain is decomposed into the different processes that falls under each department. The student sat down with the operator and wrote these processes step by step as the operator did it. Below are lists of the end-to-end processes.
3. Deliver Processes

**Design:**
Two designs (Appendix A) were created, one in Microsoft Visio and one in BizAgi Process Modeller. They were presented to Frans Brand and he considered the one done in BizAgi to be the better one of the two.

The design will therefore be done in BizAgi and will be presented as follows:

Processes with more than 1 operator will be modelled in a Swim lane format. Other processes will be modelled in normal flow diagram format.

<table>
<thead>
<tr>
<th>Processes for HR include:</th>
<th>Processes for Workshop include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>Work orders</td>
</tr>
<tr>
<td>Induction</td>
<td>- Orders with requests</td>
</tr>
<tr>
<td>Disciplinary</td>
<td>- Orders without request</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Receiving Purchase Orders</td>
</tr>
<tr>
<td>Performance Management</td>
<td>Fleet Maintenance</td>
</tr>
<tr>
<td>Policy and procedure</td>
<td>Lubricant usage</td>
</tr>
<tr>
<td>Employers Equity</td>
<td>Capturing Materials for Repair</td>
</tr>
<tr>
<td>Payment of salaries</td>
<td>Washing Trucks</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Processes for Admin Include:</th>
<th>Processes for Operations include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pula procedure</td>
<td>First information of claim</td>
</tr>
<tr>
<td>Foreign Requisition forms</td>
<td>Fine Procedure</td>
</tr>
<tr>
<td>Reimbursing Pula</td>
<td>Workshop Vehicles</td>
</tr>
<tr>
<td>Petty Cash Procedure</td>
<td>Checking trip sheets</td>
</tr>
<tr>
<td>Reimbursing Petty cash</td>
<td>Capturing of trip sheets</td>
</tr>
<tr>
<td>Fine procedure</td>
<td>Filing of trip sheets</td>
</tr>
<tr>
<td>Great Planes procedure</td>
<td>Signing of Km</td>
</tr>
<tr>
<td>Creating Purchase Order</td>
<td>Key nuggets</td>
</tr>
<tr>
<td>Capturing Purchase Order</td>
<td>UPN Trip reports</td>
</tr>
<tr>
<td>Processing Invoices</td>
<td>Food reports</td>
</tr>
<tr>
<td></td>
<td>Store deliveries</td>
</tr>
<tr>
<td></td>
<td>Supplier Collections</td>
</tr>
<tr>
<td></td>
<td>Dispatching Procedure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Processes for HR include:</th>
<th>Processes for Workshop include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>Work orders</td>
</tr>
<tr>
<td>Induction</td>
<td>- Orders with requests</td>
</tr>
<tr>
<td>Disciplinary</td>
<td>- Orders without request</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Receiving Purchase Orders</td>
</tr>
<tr>
<td>Performance Management</td>
<td>Fleet Maintenance</td>
</tr>
<tr>
<td>Policy and procedure</td>
<td>Lubricant usage</td>
</tr>
<tr>
<td>Employers Equity</td>
<td>Capturing Materials for Repair</td>
</tr>
<tr>
<td>Payment of salaries</td>
<td>Washing Trucks</td>
</tr>
</tbody>
</table>
In Figure 10 (Process with one operator) the blue arrow will indicate the name of the process which is modelled and the person who is responsible for the process. The block indicated with the orange arrow, indicates the process itself. This means where the process starts (Green circle), each step that should be taken (Blue blocks) and where it ends (Red circle).

Figure 10: Example of process with 1 operator: Capturing Lubricant Usage

Figure 11 illustrates a process with more than one operator. The orange arrow shows the process and the blue arrow indicates which persons are responsible. The green arrow shows the process which were documented.
Figure 11: Process with more than 1 operator: Foreign Requisition form

**Modelling:**
The processes that were written down were modelled by using the approach described in the development plan:

The beginning and end of the process were identified. A detailed description of each step of the processes was entered into the appropriate flow diagram blocks. Diagram blocks used are illustrated as follows:

- **Start event**
- **Task**
- **End event**
4. Execution
   Student went through processes to see if the process is executed as documented. Changes were made where necessary.

5. Print the processes
   Final processes were used to assemble the Process Guideline. The document was then printed. See attached Guideline.

   Guideline Handed to FnF for training of new employees. This guideline can also assist current employees, if they need to do the work of someone who is absent from work. It can guide them on how to perform the work, if they are not trained to do it.
5.3. Application of problem solving method for the approach to improvement of processes

Processes chosen to analyse for improvements were:

- The washing of trucks
- Induction
- Policy and procedures

5.3.1. Washing of trucks:

The truck wash process was selected and analysed to determine if improvements can be made. Metrics selected to measure the process were time and cost.

A truck consists out of a horse, and trailer. It takes 15 minutes for four operators to wash a truck inside and outside (Measurements were taken by FnF). This is when one operator cleans inside the trailer, two operators wash the trailer outside and one operator washes the horse. FnF are currently washing trucks with this option.

Time measurements were taken for different alternatives of operators. Figure 12 illustrates the 6 alternatives. The washing of trucks has boundaries from 10 minutes to 20 minutes. If washing takes longer than 20 minutes or less than 10 minutes it is not acceptable. The reason for these boundaries is that if it takes longer than 20 minutes all trucks that need washing won’t be washed. If it takes shorter than 10 minutes the operators will have too much idle time. The total man hours (time it takes the operators to finish washing) were calculated.

<table>
<thead>
<tr>
<th>Alternatives</th>
<th>Currently</th>
<th>Time 2</th>
<th>Time 3</th>
<th>Time 4</th>
<th>Time 5</th>
<th>Time 6</th>
<th>Time 7</th>
<th>Time 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trailer</td>
<td></td>
<td>2</td>
<td>15</td>
<td>1</td>
<td>30</td>
<td>2</td>
<td>15</td>
<td>1</td>
</tr>
<tr>
<td>Horse</td>
<td></td>
<td>1</td>
<td>15</td>
<td>1</td>
<td>15</td>
<td>2</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Total operators</td>
<td></td>
<td>4</td>
<td>3</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Time</td>
<td>15</td>
<td>30</td>
<td>15</td>
<td>30</td>
<td>30</td>
<td>10</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Man hours per truck (minutes)</td>
<td>60</td>
<td>90</td>
<td>90</td>
<td>150</td>
<td>120</td>
<td>80</td>
<td>84</td>
<td></td>
</tr>
</tbody>
</table>

Figure 12: Excel Spreadsheet of different alternatives
From Figure 12 and Figure 13 it is evident that the way FnF are washing their trucks is optimal when considering cost. The man hours per truck are 60 minutes. Man hours were calculated as:

Total Operators x The Max time for an operator to finish

It takes 4 operators to wash the truck so 4 operators will have to be paid. When considering for instance option 1 with 3 operators, it will take longer to wash the truck and the time is out of the boundary. Fewer operators will be paid but all trucks will not be washed. When considering option 5 with 8 operators, the cleaning will be very quick, but there will be too many operators to pay. When operators are idle too much money will be spend on payments to operators being idle.
This concludes that no improvement in the washing of trucks (considering number of operators) can be made, but this analysis states that FnF are working at minimal cost for washing their trucks.

5.3.2. Induction

The Induction process was also selected for analysis. When looking at this simple process in Figure 14 there is no measure in which the person who went through induction are measured to. Thus FnF doesn’t know if their induction is really successful or helpful to the new employee.

![Induction – HR Manager](image)

Figure 14: Current process for Induction

For improvement of this process a recommendation will be made to FnF. After the person worked through the induction book and had a tour across the facility, FnF can implement an induction test to see if the new employee understands all that he/she has learned about FnF. Figure 15 shows the proposed new process for induction:
The person will look through the induction booklet and have a tour around the facility. Then he/she will do an induction test. If he/she passes one will know they understand the facility and all activities around facility and they can start work. Otherwise if they fail, it concludes that they don’t understand and they will do induction again. This will make the induction process more effective. It will also contribute to the new employees’ knowledge about his new working environment.

5.3.3. Policy and procedure

The policy and procedure process were analysed to see if there is possibility for improvement. Figure 16 illustrates the current process.
Policy and Procedure-HR Manager

Figure 16: Current Policy and Procedure Process

For the Policy and procedure the following recommendation was made. FnF can implement a Scorecard to measure the new procedure (A new Policy would not be measured, only applicable for procedures) after it has been designed. Instead of just implementing a new procedure it will first be measured to certain metrics such as: will workforce adapt to the new procedure? Figure 17 illustrates the scorecard with suggested metrics to measure.

<table>
<thead>
<tr>
<th>Scorecard</th>
<th>Very bad</th>
<th>Bad</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Acceptable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Will the workforce be able to adapt to the new procedure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Feasibility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Cost effectiveness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 17: Proposed Scorecard for Policy and Procedure process

Figure 18 shows the new proposed process. After the design the procedure can be measured and if it is according to the standard (Determined by FnF) the HR manager can discuss it with his people.
This improvement will contribute to the standard of new procedures being implemented at FnF.
Chapter 6

6.1. The contribution this project will make to FnF

The implementation of the user manual will save time and money. Firstly, time can be saved in the sense that if an operator should do another operator's work, no one will have to take time to show the operator how to do the process, he can just use the manual. Secondly, money can be saved in the sense that less money will have to be spent on training of new employees.

The contribution this project made when considering the improvements are:

With the analysis of the truck wash FnF can confirm that the trucks are being washed at minimum costs.

The recommendation of the induction process can make the process of induction more effective. This can be a future improvement FnF can take into consideration at their organisation.

The recommendation to the Policy and Procedure Process can improve the standard to which new procedures are being implemented.

6.2. Conclusion

After an in depth description of the problem at FnF the student has researched techniques, tools and methods to solve the problem described. This research information was obtained from the reading of journals, articles and web pages. The techniques and methods were studied and a good understanding of each had to be obtained. Then the best methods and techniques from the researched have been selected to solve the problem. These selected methods and techniques were used to design a solution for the problem. This design includes the use of a CMM, BPM, Standardising method, Process Modelling tools. Technology included is BizAgi and Microsoft Word.

The developed solution was used for problem solving. Processes were documented and a Process manual were conducted (See Attached Guideline). Processes that have potential to
be improved were selected. These processes were analysed and recommendations was made.

To conclude, the best methods and techniques to the students knowledge has been used to design the best solution possible for the problem identified at FnF.
7. Glossary

Fast Moving Consumer Goods (FMCG): This acronym is defined as essential or non-essential goods such as food, toiletries, soft drinks, cosmetics etc. They are fast selling, value consumer goods with a universal demand.
8. Appendices

8.1. Appendix A

**Procedure for the handling of traffic fines.**
This procedure must be followed when a driver gets a fine

1. The contract manager retrieves the trip sheets for the day with the same registration number as the vehicle fined.
2. From the trip sheet find person responsible for driving the vehicle that specific day.
3. Contract manager must explain the traffic fine to driver (Reason for getting the fine and what the consequences are)
4. Get certified copy of ID and drivers licence.
5. Complete driver’s personal details on the form.
6. The driver to sign form.
7. Take documentation to the commission of oath and get stamp and signature.
8. Capture the documentation on the computer on the Fine Schedule.
9. Give the documentation back to the Licensing Administrator

Microsoft Visio Example
Capturing Lubricant Usage – Work Shop Administrator

1. On Desktop click on Ojpro
2. Click on Reports and email
3. In the results that are displayed, select the correct truck
4. Click Search
5. In Search Criteria block, enter Fleet Number
6. Click on Lubricant usage
7. On Desktop click on TMS to go onto system
8. In Lubricant Usage details block type in the date the lubricant was given
9. Enter the Type of Lubricant
10. Enter the quantity in Tank QTY
11. Select Workshop (Centurion)
12. Select Warehouse
13. Click Save

This you can see from the printed report
The type and quantity can also be viewed from the printed report

BizAgi example
9. List of references


This document will serve as a guideline, giving step by step instructions on how to perform the processes expected by Fast ‘n Fresh of their employees.
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1. How the guideline works

1.1. Process with one operator

A step by step illustration of processes is constructed into flow diagrams. The process and the operator responsible for process are indicated (Blue Arrow), and the process itself then follows in the diagram (Yellow Arrow).

Capturing of Trip Sheets - Data Capturers
1.2. Process with more than one operator

When more than one operator is involved with a process the diagram will look as follow:

Process will be indicated (Blue Arrow), Operators involved will be indicated on the left side (Red Arrow), and then the process itself on the right (Purple Arrow).

Signing of the kilometres
1.3. Process steps are indicated by one of the following symbols:

- A green circle indicates that a procedure starts, and the action that need to be performed taken are written next to the circle in the arrow line.

- The blue rectangle indicates all the procedure steps that need to be followed. An arrow will indicate which direction the procedure flows.

- A red circle indicates when a procedure stops. The last step of the procedure will be written on the last arrow connecting the blue rectangle with the red circle.

- The yellow diamond indicates that there are two ways of flow. If a decision needs to be made and there are different outcomes there will be two arrows indicating different steps of following the procedure.

This block provides the user with extra information about the procedure.
1.5. Transport Management System (TMS)

For all capturing procedures on TMS the operator must:

- Switch Computer on
- Enter Password
- Click on Desktop Icon on Imperial TMS
- Enter User Name
- Enter Password

2. Processes

Processes are documented under the department which are responsible for the execution of that process.

The departments are:

Workshop

Human Resources

Administration

Operations
2.1 Workshop

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2.1.1. Work Order procedure - Workshop Administrator

Click on Workshop Tab

Click on Work Order Request

Enter the Fleet number at the Fleet Number option

Click search

Choose the correct Work Order number

Click on Convert

A convert block will appear and ask if you want to convert

Click Convert

Click on Workshop

Enter the Actual time and date that the truck came in, in the Actual time and date option

Enter availability time and dates of vehicle which is in the Work order status Scheduled option

Change Work Order status (Which at this point will be pending) to Schedule

Enter the meter readings of vehicle in the meter reading at start option as it is when it arrived at the workshop

Select Work Order number

The same Work Order number as on the request will appear in the left corner of the screen

Click search

Type in the Fleet number in the search criteria block

Click on Work Order

In Failure Description block enter the description of what needs to be fixed

Next to Failure/Resolution details click on new

At the select fleet number option, select the correct fleet number

In the Failure category, select the category where the repair need to be made

Select the Failure sub category

In the cause of failure description block, type in what must happen to what was mentioned in the failure sub category block

Click Save

Select Fleet number

Click on New

Click on Next Service

Click Save

Select the fleet number on the screen that will be displayed

If kilometers is over service kilometres and due for the next service, click on missed service, otherwise skip the step

Screen will display when next service should be

Click New

Click on next PM Schedules

Enter the current kilometers

This is the same reading as typed into the Work order option

Enter the Time and Date of the actual service into the Actual time and date option

Click Save

Click on Labour

Click New

Select employee number at the Assign employee option

Enter the time and date in the assigned option

This is the same Time and Date as entered into the service Time and Date option

Click Print
2.1.2. Work Order (With Warranty) - Work Shop Administrator

Receive job card from mechanic → Click on material → Click on new → Click on Purchase orders → Enter Fleet number or Work order number → Work Order numbers will appear on screen → Select Work order number that must be completed → Click on Failure resolution details → Select the correct Fleet number.

Click on Warranty → In the hour block enter the hours it took to do the job → Enter the Failure Category → Enter the fleet number → Enter the Time and date → Enter the kilometers or time the warranty is valid for → Enter the fleet number → Select Failure category → Select failure sub category → Select supplier number → Click Save → Click Work order.

Next to warranty details click now → In the work shop block, select the workshop where repairs took place → Click New → Click Work order → Click on Work shop → Click on Work order → Enter the Time and date → Enter the Time and date block → Enter the Time and Date the service ended in the time and date block → This will be the same as meter reading entered at the beginning of service → At meter reading, enter the meter readings at the end → Click Work order.

Select the correct fleet number → Click on Requestor → Enter requester → Enter the kilometers in the current meter reading option → Select Date and time → Click Work shop → Click Purchase order → Click New → Enter Supplier number → Select requestor.

Select the option of what must be done → In the item number option select fleet number → Enter Item description → Enter Unit cost → From purchase order select Work order number → Click on Fleet number → Enter failure category → Enter failure sub category → Enter the quantity → Click Save → Click Integrate.

The order number will be displayed after you click on the save button → Enter address in the Deliver goods option → Enter the expected delivery date and time, in the date and time block → Select the warehouse → Enter Time and date that the work has been done → Click Print.
2.1.3. Work Order (With Request) - Workshop Administrator

[Diagram of work order process]
2.1.4. Work order (Without Request) - Work Shop Administrator

- Receive Jobcard from mechanic
  - Click on material
  - Enter the Date and Time
  - Click on new next to Purchase orders
  - Enter Fleet number or Work order number in Search Criteria block
  - Select Work order number that must be completed
  - Click on Failure resolution details
  - Select the correct Fleet number

- In Status Block change status to complete
  - Enter the Time and Date the service ended in the time and date block
  - In status block, change status to complete
  - Click on Work shop
    - Click Save
    - Click on Work shop
    - Click Save
    - In status block, change status to complete

- Enter the Failures Category
  - Enter the Failure Category
  - In the hour block enter the hours it took to do the job
  - Click Save
  - Click Work order

- At meter reading enter the meter readings at the end
  - This will be the same as meter reading typed in at the beginning of service
  - Enter the Time and Date the service ended in the time and date block
  - In status block, change status to complete
    - Click on Work shop
    - Click Save

- Select the requestor
  - Select requestor
  - Select Supplier number
  - Click new next to Purchase Order Maintenance
  - Click on Work shop
    - Click Save
    - Click New

- Enter the expected delivery date and time
  - Enter the expected delivery date and time in the date and time block
  - Select the warehouse
    - Enter the quantity
      - Enter failure category
        - Click on Fleet number
          - Select Work order number from Purchase Order
            - Enter Unit cost
              - Enter Item Description
                - In the Item Details block select Item number (Fleet number)
  - Enter address in the Deliver goods option block in the Delivery Details option
    - Click save
    - The order number will be displayed after you click on the save button

- Click on Fleet number
  - Click Integrate
    - Click Print
2.1.5. Receive Purchase Order - Workshop Administrator

1. Click on Workshop
2. Click New next to Receipting maintenance
3. Select the Supplier number
4. Enter Supplier Document Number
5. Click Save
6. Click on Detail
7. Select correct purchase order
8. Click Save
9. Confirm the quantity that you have received and the Unit Cost
10. List with all purchase numbers will be displayed
2.1.6. Capturing Lubricant Usage - Workshop Administrator

On Desktop click on Oilpro

Click on Reports and email

Click on Reports

Specify the date of the report you want to use

Click on Preview

Click Print

Click New

In the results that are displayed, select the correct truck

Click Search

In Search Criteria block enter Fleet Number

Click on Lubricant usage

On Desktop click on TMS to go onto system

In Lubricant Usage details block type in the date the lubricant was given

Enter the Type of Lubricant

Enter the quantity in Tank QTY

Select Workshop (Centurion)

Select Warehouse

Click Save

This you can see from the printed report

The type and quantity can also be viewed from the printed report
2.1.7. Fleet Maintenance - Workshop Administrator

Click on Fleet Maintenance → In the Fleet Search Block type in the vehicle number you want to check → Now you have the option to click on, General, Maintenance, Warranty, Meter reading, Refuelling, Notes or Fines → Close Window

Here you can check all details on the vehicle you chose
2.1.8. Capturing Materials for Repairs - Workshop Clerk

1. Receive Jobcard from Workshop Administrator
2. Log into TMS system
3. Click on Workshop
4. Enter the correct work order number in the work order number option
5. Click Search
6. Select Work Order Number
7. Click on Material
8. Click New
9. Collect the right parts on the pink slip from the shelves
10. Check if the fleet number corresponds with the one on the pink slip
11. Select the correct Failure category
12. Change transfer type to issue
13. Select the warehouse (FmF)
14. Enter the Quantity
15. Click Save
16. Repeat the procedure until all items are captured
17. More than 1 items on Pink Slip?
18. Yes
   19. Check if the fleet number corresponds with the one on the pink slip
   20. Select the correct Failure category
   21. Change transfer type to issue
   22. Select the warehouse (FmF)
   23. Enter the Quantity
   24. Click Save
   25. Repeat the procedure until all items are captured
19. No
20. Sign Pink Slip
21. Hand Slip to mechanic to sign
22. File Pink Slip
2.1.9. Processing of Work Order - Workshop Administrator

- Click on Workshop Tab
- Enter the Fleet number at the Fleet Number option
- Enter the Actual time and date that the truck came in, in the Actual time and date option
- Enter availability time and dates of vehicle which is in the Work order status Scheduled option
- Change Work Order status (Which at this point will be pending) to Schedule
- Enter the meter readings of vehicle in the meter reading at start option as it is when it arrived at the workshop
- Select Work Order number
- Select the Fleet number on the screen that will be displayed
- If kilometers is over service kilometers and due for the next service, click on missed service, otherwise skip the step
- Enter the Fleet number at the Assign employee option
- Select employee number at the Assign employee option
- Enter the Time and date of the actual service into the Actual time and date option
- Enter the Time and date in date assigned option
- Click on the Failure/Resolution Details option
- Enter the current kilometers
- The same Work Order number as on the request will appear in the left corner of screen
- In the Failure category, select the category where the repair needs to be made
- Select the Failure sub category
- In the cause of failure description block, type in what must happen to what was mentioned in the failure sub category block
- Click on the Next Service
- Next to Failure/Resolution details click on new
- Click on New
- Click on Workshop
- Click on Convert
- Type in the Fleet number in the search criteria block
- Click on Work Order
- Click on Convert
- A convert block will appear and ask if you want to convert
- Click on Workshop Tab
- Click save
- Click on Workshop Request
- Click search
- Choose the correct Work Order number
2.1.10. Truck wash (Outside) – Washer (3 Operators)

- Spray truck with soap (Transolve)
- Open both taps to mix
- Clean truck with brooms
- Spray with water

Next steps dependent on cleanliness.
2.1.11. Trailer wash (Inside) - Washer (1 Operator)

- Spray with soap (Quatsan)
- Scrub with broom
- Clean out with water
- Spray with Super Shot and leave
2.1.12. Inside horse- Cleaner (4 Operators)

Blue trucks are vacuumed with the green vacuum cleaner. It cleans the dust.

Red trucks are vacuumed with the vacuum cleaner that washes and vacuums.
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2.2.1. Recruitment Process - HR Manager

- Is there a vacancy open?
- Write Job description
- Identify Job Specification
- Type Advertisement
- Advertise Internally via email
- If there is no applications after 2 weeks, advertise externally via newspaper
- Have the Interviews
- Invite applicants for interviews (phone them)
- Short list the applicants
- Gather Applications after closing date
- Rate them 1 to 10 scoresheet
- Add the figures together
- Rating of 1-10 according to KPI's that you identify
- Person with highest figure will then get appointed
- Appoint person
2.2.2. Induction - HR Manager

Hand person the induction booklet

Take the new employee on a facility tour and introduce him/her to everyone

New employee will read through it by him/herself and ask questions if anything unclear

Take new employee to the department of employment
2.2.3. Resignation Process - HR Manager

- Arrange meeting with person resigning
- Hold exit interview with employee
- Identify reason for resigning
- Plan future corrective action if needed
- Rectify problems
2.2.4. Disciplinary – HR Manager

- Complaints to HR manager
  - Investigate the complaint
    - If person is guilty, charge the accused
      - Organise a hearing, where HR manager serves as Chairperson
        - As chairperson to hearing listen to the sides of the story and make a ruling based on the stories
          - People to attend are, HR manager, Accused, Representative to accused and Employer Representative
            - If case goes to Commission of conciliation, mediation and arbitration (CCMA), represent PnF
              - Dismiss Person
              - Declare dispute to CCMA
              - Decision rests with CCMA
              - Give Warning

- Person guilty?
2.2.5. Policy and Procedures – HR Manager

Is there a new policy or procedure to include?

Design and make drafter

Discuss Drafter with shop steward and management

Maintain existing policies: Audit them

Amend if not in line
2.2.6. Employment Equity – Employers Equity Committee

Schedule meeting for committee → Discuss and make targets for the year → Decide how many people to appoint for the year based on demographics

Submit Employers Equity report to Department of Employment September of each year

This aspect links with recruitment, you will know what ideal person you are looking for to appoint
2.2.7. Training and development - HR Manager

1. Schedule meeting in January
2. Decide on what training should be done for next 12 months
3. Get inputs from the training committee
4. Construct the Annual Training Plan
5. Train employees according to Annual Training Plan
6. Send reports to Department of Labour
7. Construct reports
2.2.8. Performance Management – HR Manager

1. Schedule meetings with workers
2. Meet with workers
3. Set goals to which their performance must be measured
4. Monitor these goals quarterly
5. Decide on bonuses and increases
6. Are these goals met?
7. Review goals at the end of the year
8. From these results set goals
9. Send for Training and Development
2.2.9. Payment of salaries – HR Manager

- Calculate hours worked
- Authorise overtime if any
- Determine who gets Km Bonusses and No accident Bonusses
  - Km Bonus for person driving over 11000km, and No accident bonus if there was no accidents
- Payments made 3 days before payday
- Distribute to Line Managers
- Print Payslips
2.3 Administration

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2.3.1. Petty Cash Requisition - Person Requiring Petty Cash

Petty Cash Requisition must be approved by authorised people of that specific department:

Up to R200 - Department Supervisors
Up to R500 - Heads of Departments
Above R500 - Accountant or Director
2.3.2. Capturing Petty cash Step 1 - Admin Administrator

1. Open Petty Cash Spreadsheet

2. Enter details at the Petty cash issued-waiting for invoice/receipt option

3. Enter the supplier to whom the cash is paid to

4. If you don’t know who the supplier is, enter the person name who received the money

5. Enter the description of expenses

6. Enter the cost coding

7. Enter the amount

8. Wait for invoice
2.3.3. Petty cash 2 - Admin Administrator

1. Receive Invoice/Receipt.
   - Complete petty cash requisition form.
   - If there is more than one supplier all must be listed separately and costed separately if needed.
   - Enter the Supplier name in the cash paid to box.
   - Amend Petty cash requisition form to the correct amount according to the invoice/receipt.
   - Check that change received is correct according to the amount on the invoice/receipt.
   - Attach invoice/receipt to the back of petty cash requisition, and place in petty cash tin.

2. Follow up on Petty cash issued-waiting for invoice to ensure invoice are received within 24 hours from the person who took petty cash.

3. Enter VAT amount in the column.
   - Enter amount excluding VAT in the Excl VAT column.
   - Entries under petty cash slips must be numbered and it must run in numerical order starting from #1.
   - Entries are now made under petty cash slips.
   - Open corresponding petty cash spreadsheet.

4. If there is no VAT, total must be entered into the Excl VAT column. All totals will be calculated automatically in the total column.

5. If it doesn’t balance to zero double check all entries.
   - This balance will reflect under Unreconciled Amount.


7. Save Spreadsheet.
2.3.4. Reimburse petty cash - Admin Administrator

Petty cash tin is always locked and one designated person is responsible for issuing money and ensuring all documentation is correct. Should this person be sick or on leave for less than 48 hours the Accountant will take responsibility. If the person are sick or on leave for longer than 48 hours Petty cash must be signed by designated person, and the person receiving petty cash as per instruction of the accountant, showing the amount of money and entries as per the day of handover. On return of designated person another handover must be done and signed for and all money must be double checked. Petty cash tin must always be kept in a locked drawer during office hours and locked in Accountants office over weekends.
2.3.5. Capturing Traffic Fines - Licensing Administrator

- Click on create new batch
- Select capture new fine
- Under first information enter fine number
- Enter batch ID
- Enter date received (either via post or by hand)
- Enter Magisterial District
- Enter Registration number
- Under Fleet Detail Box enter the payment Date of fine
- Select Category e.g Speeding/Overloading
- Enter place offence happened
- Enter time of offence
- Under Offence enter date of offence
- Enter the court date
- Under Responsible for cost select who is responsible e.g FNF, Driver, customer
- Enter short description
- Enter Charge amount and Contempt of court if necessary
- Click Save
- Click on print
- Close file on computer
- Collect printout
- Attach printout to fine and send to division for approval
2.3.6. Capturing Great Planes - Licensing Administrator

[Diagram of the process flow, including steps such as scanning documentation, selecting transaction types, and handling fines.]

- Receive documentation from division
- Open great planes
- Click on Transactions
- Click on Purchasing
- Click on Transaction Entry
- Under Voucher number select Voucher number
- Select Invoice as document type
- Under batch ID select batch number
- In Payment terms select Default
- In Remit to select Primary
- In Address Id select Primary
- The name will appear
- Under Creditor ID select Creditor of traffic Department
- Under description give small description of fence e.g. Speeding/Overloading
- Save as traffic fines
- Under Doc Date enter the date
- Under Document number enter the fine Reference number
- Select standard at Shipping Meth
- At Tax Schedule ID select VATINVA
- Under purchases enter the amount
- Under select distributions enter the distribution Reference
- Print and hand to Accountant for authorization
- Attach fine to Voucher No Form, Note Attachments, Inventory, Fines
2.3.7. Foreign Exchange Requisition Step 1

- Complete Foreign Requisition Form
- Issue Pula from Pula Tin
- Log onto system
- Click on Pula Issued-No permits yet
- Enter Date
- Enter Fleet number
- Enter Amount
- Sign for money
- Take form to admin Administrator
- Take to Controller/Accountant/Operating Director to sign
- Sign Form
- Save and Close
2.3.8. Foreign Exchange Requisition Step2 - Admin Administrator

1. **Receive Permit from Person Issuing Pula**
   - Complete missing information on foreign exchange requisition form
   - In horse column, type in Fleet number used
   - In BWP column type on amount of Pula used for vehicle
   - Follow up all the entries under Pula Issued - no permits yet. This is to ensure that border permit is received within a reasonable time.

2. **Check amount and amend if necessary**
   - Enter date of request for Pula
   - Go to Breakdown of denomination heading
   - Update the denomination of money

3. **If change are received, check that everything balances**
   - Move Pula Issued - no permits yet, to top under Telegraphic Transfer
   - This is to have an accurate record of pula in tin

4. **Attach border permit to the back of foreign exchange requisition form**
   - Open Pula Spreadsheet

5. **Save and close**
2.3.9. Reimbursing Pula Step 1 - Admin Administrator

When Balance is between 1500 and 2000 Pula, Pula needs to be reimbursed. When starting reimbursement the total must always be rounded off to the nearest 100. The rounding amount must be entered into overdrawn. Round up to next 100
2.3.10. Reimbursing Pula Step 2 - Admin Administrator

When invoice is received, open the Pula Bidvest bank control sheet → Type in the date on the invoice → In the Receive BW Invoice option type in the Invoice number → Type in the total amount on the invoice → Open the Pula spreadsheet.

Check and see if the Total in the RANDS column are the same as the outstanding amount on the invoice. If not make corrections → Type in the Vat on above → If there is a rounding amount on the invoice type in the Rounding Diff option → Type in the transaction fee → Type in the commission → Type in the foreign exchange rate.

Add the amount of VAT at top of invoice and next to Sub total together → The amount under sub total of FET is the amount to be used → Comm% is the amount to be used → The rate next to the overdrawn must also be changed.

Click Save → Type in the date on the invoice → If there is a rounding amount on the invoice type in the Rounding Diff option → Type in the transaction fee → Type in the commission → Type in the foreign exchange rate.

Print Pula Spreadsheet, attach all relevant Foreign exchange requisitions with border permits at the back → Hand this documentation together with the invoice to the accountant for approval → Once approved, scan and forward approved invoice to Cape Town → Make copies of border permits and attach the copies to the back of the foreign requisition form → Print Pula Bidvest Control sheet and attach original border permits to the back.

When Pula is received, check if right amount is received → Follow up with Cape Town for proof of payment and forward it to Bidvest bank.
Pula tin is always locked and one designated person is responsible for issuing money and ensuring all documentation is correct. Should this person be sick or on leave the responsibility is handed to another person as per instruction of Accountant. If the person are sick or on leave for a long period Pula must be signed by designated person, and the person receiving Pula as per instruction of the accountant, showing the amount of money and entries as per the day of handover. On return of designated person another handover must be done and signed for and all money must be double checked. Petty cash tin must always be kept in a locked drawer during office hours and locked in Accountants office over weekends.
2.3.12. Capturing Purchase Order - Creditors Clerk

Click on transactions → Click on Purchasing → Select Purchase Order Entry → Click Tab → Click Tab → Click Tab → Click Tab → Click Tab → Enter date that is written on the purchase order → Click Tab → Enter first 3 letters of company's name to get correct Creditors ID, click on magnifying glass, creditors beginning with these letters will appear. Double click on contact company → Click Tab → Click Tab → Click Tab → Click Tab → Click Tab → Select what you typed in the Description of goods; press Ctrl + C to copy the description → Click Tab → Enter date that is written on the purchase order → Click Tab → Buyer ID – Select your use ID → Click Tab → Buyer ID – Select your use ID → Click Tab → Click Tab → Type in exactly the Description of goods as on the order → Type in the quantity that is given on the order → Click Tab → Click Tab → U of M – Always type EACH → Type item Description in, click on and select appropriate account e.g 20-20 printing and stationery → Click Tab → The type of order must always be Standard → Click Tab → At the bottom left hand side of the screen click on the blue arrow in the comment ID field → You will now be taken back to the Purchase Order Entry screen → Close the window → Click on the SAVE button in the Purchasing Item Detail Entry window → A little box will open – Purchasing Item Entry, press Ctrl + V to paste the description in → Click on the blue arrow in the comment ID field → Make sure that the cost code displayed is right → Click OK → Close the window → A new window will open – Purchasing Item detail Entry → Click on SAVE button.
2.3.13. Print Receiving orders and Batch Orders - Creditors Clerk

Click on Transactions

Click on Purchasing

Click on Purchasing Batches

Click on search

Select the Batch that you want to print

Click OK to print

Make sure destination is on printer click OK

Select destination

Click on the print button icon

Click on the select button

Click ok in the popup print screen

Punch in ID code

Click OK
2.3.14. Processing invoices 1 - Creditors Clerk

Enter onto Invoice Log Sheet - WS tab on relevant date

All invoices on the sheet are attached to the log sheet

Open GP Dynamics

Click on Transactions

Click on Purchasing

Invoices are now re-processed in GP Dynamics

Click on Enter Match/Invoices

In Receipt number field type your order number always starting with (X)

Click Tab

In Invoice Date field, put the date in that is given on the invoice

Click Tab

Should it belong to an old month that has already been closed the date must then be the first date of the current open month

Click Tab

Batch numbers run in numerical order, record of last batch number used is kept in receiving and invoicing file. Enter Capturer initials after the numerals (eg 3546CT)

In Batch ID field enter next number

When a new batch number is used, you will be asked if you would like to add this batch. Click YES

The purchasing Batch Entry screen will open and in the comment filed, enter JHB INV CAPT

Click Save

Close this screen
2.3.15. Processing Invoices 2 - Creditors Clerk

Click Tab

In the Creditor ID Field enter the creditor id number

Click Tab

Click on the Auto-Invoice button at the top

Order numbers thats relevant for this creditor will appear in list on the left hand side. Their only orders thats still open and can have invoices entered

Click on the correct order number in this list

The order number will be printed on the invoice

Click on the description in the second line

Once all items on the invoice have been selected, click on the Invoice button at the bottom

Select items from list ensuring they match items on invoice. Click on small square next to the item.

Make sure the Quantity invoice is the same quantity as on the invoice

This must be done for all the items on the order and invoice

Select Base or Creditors

If the Creditor is not VAT applicable, select Non Taxable

Click on OK

This must be done for all the items on the order and invoice

If the invoice quantity is less, then the Quantity invoiced figure must be changed to the same as the invoice

Click on the drop down box next to item – the various TAX options will appear

Click on the blue arrow next to item

The Purchasing Batch Entry screen will appear

A maximum of 16 invoices can be captured on a batch

Once all the invoices have been captured, click on the blue arrow next to Batch ID

Click on SAVE button at the top

Click on OK button

In the Reference field, type a short description of the items on the invoice

Click on Distributions button at the bottom

Check the Extended cost is the same as on the invoice for each line item

This amount is VAT exclusive

If the amount in different, the Extended cost must be changed to the same amount as on the invoice

If not all items on order may appear on the invoice, select only the items on their invoice

Not all items on order may appear on the invoice, select only the items on their invoice

MAKE SURE YOU CLICK ON THE CORRECT ORDER NUMBER IN THE LIST

On the right hand side, line items with their descriptions and amounts will be displayed for the order number you have selected

If Workshop allocated a different order number, write this one on the invoice cross incorrect one out.

Click OK

Select Printer as the report destination

Number of copies should be 1

Click on the printer icon in the top right hand corner

On the right hand side, line items with their descriptions and amounts will be displayed for the order number you have selected
2.4 Operations

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2.4.1. Fine Procedure

- Receive fine documentation
- Retrieve trip sheets for the day with the same registration number as the vehicle fined
- From the trip sheet, find the person responsible for driving the vehicle that day
- Call driver in
- Explain the traffic fine (reason for getting the fine and what the consequences are)
- Get certified copy of ID and driver's license
- Complete driver's personal details on the form
- Take documentation to the commission of oath and get stamp and signature
- Capture documentation on the computer on the Fine Schedule
- Make copy of ID and Driver's License
- Visit contract manager
- The driver to sign form
2.4.2. Checks on Trip Sheets - De-briefer

Check trip sheet

Check that driver name, no, and correct fleet number are written down correctly

Check that date is clearly recorded

Check that Km's and times follow in sequence

Check all du's and load control sheet numbers are clearly and correctly written down

Check that fridge hours are recorded

Ensure that trip sheet with copy of LCS are sent to data capturer

Check all load control sheets and POD's are returned with trip sheets
2.4.3. Capturing of Trip Sheets - Data Capturers

- Receive Trip Sheet
  - Capture Vehicle used under right category
  - Capture trips for diesel, services, washing etc. if necessary
  - Check variances in blue on IDS Vehicle Odometer Sequence check report
  - If "pop up" warning appear on screen, read and address immediately. DON'T IGNORE
  - Food core fleet under FC; Clothing and HOME core fleet under CC; Additional and replacement under FA or FR
  - Variances above 4Km checked and validated. Check route, load should start at DC and end at DC
  - At the end of week, print full report, check report, correct mistakes, check if it balances with DU's balance and totals
  - Balance daily with totals from Woolworths DC on the DU Control sheet
  - Capture all DU's received
  - File Trip Sheet
  - When all corrections are made hand to Accountant for sign off
  - Hand a copy of reconciled sheet to Operations department to follow up on variances

Advice relevant people to commence invoicing
2.4.4. Filing of Trip Sheets (to Metro file) - Data Capturer

- Collate trips sheets by date and shift order and then in trip sheet number order
- Check if all trip sheets are in bundle as per the Dispatch sheet
- Capture the trip sheets on the Metro file Cover Sheet
- File signed copy
- See that documents in box corresponds with Metrofile cover sheet
- Print 2 copies: 1 to be signed by by Metrofile upon collection of documents, and the other to stay in box as reference
- Check trip sheets against captured sheets
2.4.5. Signing of the kilometres

- Complete capturing and balance
- Advise Operations manager that capturing is complete
- Report will be signed off with UPN representative
- Print Trip Km Check report
- Sign off Km (Fast n Fresh Sign Off sheet must be used)
- Send copy to Cape Admin Department for invoicing
- Advise Cape Admin of additional and replacement vehicles
2.4.6. Key Nuggets - Fast 'n Fresh Heads

Key nugget report distributed among FnF head of departments

Comments and changes be made by close of business every Wednesday

Distribute key nugget report to UPN on Thursdays
2.4.7. UPN Trip Reports - Data Capturer

1. Log in on IDS
2. Select UPN on Local Distribution
3. Select Gauteng
4. Select UPN Trip reports
5. Once period has been specified, report will generate and display on screen-UPN, Odometer Sequence check-Upn, Gauteng, Local Distribution
6. Enter end date in pop up box and click enter
7. Enter Start date in pop up box and click enter
8. Use report to Check Km sequence per day per vehicle
2.4.8. UPN Food report (Delivered) - Data Capturer

Log in on IDS

Select UPN Local Distribution → Select Gauteng → Select UPN FOOD Reports → Select Store deliveries

- Once period has been specified, Report will generate and display on screen - Woolworths Food Store Deliveries-UPN Bauteng Local Distribution
  - Enter WW month and click OK
  - Enter WW week and select OK

Use report to check DU's delivered daily to stores
2.4.9. UPN Food reports (Collected) - Data Capturer

- Log in on IDS
- Select UPN Local Distribution
- Select Gauteng
- Select UPN Food Reports
- Select Supplier collections
- Enter WW Month and select OK
- Enter WW Week and select OK
- Check that all information is correct
- Check DU's collected daily from the Suppliers
- These figures are used in the Surcharge report and saved on the sharedrive to raise weekly invoices to Woolworths
- Send to Woolworths
- Save copy on the Adserver

Once period has been specified report will generate and display on screen Woolworths Food Supplier Collections-UPN Gauteng Local Distribution

DU's delivered and totaled must balance with totals from WW
2.4.10. UPN C&H Reports (Store Deliveries) - Data Capturer

- Log in on IDS
- Select UPN Local Distribution
- Select Gauteng
- Select UPN C&H Reports
- Select Store deliveries
- Enter WW Month and select OK
- Enter WW week and select OK

Once period has been specified, report will generate and display on screen-Woolworths C&H Stores Deliveries-UPN Gauteng Local Distribution

Report used to check DU's delivered daily at Store
2.4.11. UPN C&H Reports-Supplier Collections - Data Capturer

Log in in IDS → Select UPN Local Distribution → Select Gauteng → Select UPN C&H reports → Select Supplier Collections

Report used to check DU’s collected daily from Suppliers → Enter WW month and select OK → Enter WW week and select OK

Once period has been specified, report will generate and display on screen-WW C&H Supplier Collections-UPN Gauteng Local Distribution
2.4.12. Capturing workshop vehicles (Step 1) – Contract manager

Open normal workshop list → Plan the 5 a day program → Plan the services → Plan COF’s → Enter Trucks and Trailers of the road

Mail it to the business → Click Save → Put in the breakdowns
2.4.13. Workshop Vehicles Step2 - Contract Manager

1. Open TMS (Icon on Desktop)
2. Enter Username
3. Enter Password
4. Click on workshop
5. Click on Work order request
6. Click on New
7. Enter Requestor
8. Enter Priority
9. Enter Workshop
10. Enter vehicle availability
11. Enter Required Date and time
12. Enter fleet number in block that appears
13. Click search
14. Click the box next to correct Fleet number
15. Click Exit
16. In fleet details block, click on grey block with 3 dots
17. Enter fleet number in block that appears
18. Click search
19. Enter Problem Description
20. Add or edit problems
21. Save

You will enter the from and to dates and times

This will deliver the Work Order and Request number
2.4.14. First Information of a claim 2 – Contract manager

- Look underneath Excel spreadsheet
- Open Internal External drivers spreadsheet
- Enter Permanent Driver
- Enter Contract Driver
- Open accident analysis info spreadsheet
- Enter according to FIC Spreadsheet
- Save
2.3.15. Dispatching Procedure - Dispatcher

- Receive Daily plan from Supervisor
- Dispatcher calls in driver
- Dispatcher identifies drivers and allocates drivers to routes
- Dispatcher identifies vehicles and allocates available vehicles to routes
- Dispatcher fills in pre-trip information:
  - Driver name, surname and number
  - Date
  - Bay number and times
  - Type of load
- Dispatcher records the trip sheet details on the "Control Sheet"
- Dispatcher briefs the driver on the directions, requirements, and restrictions of his trip
- Dispatcher records the trip sheet details on the "Control Sheet"
- Dispatcher hands the driver his documentation
- Dispatcher writes all special requirements on the trip instruction segment of the trip sheet
- Dispatcher records the trip sheet details on the "Control Sheet"
- Dispatcher hands the driver his vehicle keys
- Dispatcher records the trip sheet details on the "Control Sheet"
- Driver scans his finger on the scanner and leaves the office to his vehicle
- Driver does a pre-trip inspection to check for any damages
- Driver records the trip sheet details on the "Control Sheet"
- Driver ensures that the vehicle and trailer is refueled.
- Driver writes the opening kilometers and fridge hours
- Driver ensures that his required securing equipment is on the vehicle.
- Set the fridge on the required temperature
- Document Departure time on trip sheet