



Dock Scheduler

Comprehensive Reference & Operating Manual

Version 16.1 - fully integrated operating guide

This manual follows the application in the order people actually use it. It explains the purpose of every main screen, the booking lifecycle, scheduling rules, permissions, administration, Developer controls, reporting, mobile/PWA behaviour, security and troubleshooting. Newer functions are integrated into the relevant sections rather than added as an appendix.

Note: The in-app Help Search is built from the same operating model. Search using normal phrases such as "lorry is here", "complete unbooked", "rename bay", "export bookings", "why can't planner resize?" or "delete photo".

1. Quick start and navigation

Sign in

1. Open Dock Scheduler.
2. Enter your username and password.
3. Choose Sign In.
4. After successful authentication the Dashboard opens.

If the account is disabled or the credentials are wrong, sign-in is rejected. Use a named account rather than sharing credentials.

Sign out and version

Use Sign Out when leaving a shared device. On mobile/PWA the Sign Out and version controls are positioned so they remain accessible around device safe areas.

Main tabs

Tab	What it is for
Dashboard	Live operational position, attention items, recent activity and short-term capacity.
Day View	Detailed bay/time schedule; booking popup; authorised drag and resize.
Week View	Working-week planning overview.
Month View	Longer forward planning view.
Bookings	Search, filter, page, export, create and open booking records.
Reporting	Operational/historical reporting and exports.
Help	Natural-language Help Search and this manual.
Admin	Booking administration, suppliers, bay blocks and Activity Log.
Developer	Capacity, hours, handling rules, bay configuration, accounts, audit and test tools.

Note: Changing main tabs is deliberately fast: the destination renders immediately from current state, then D1-backed data refreshes quietly in the background. Pull-to-refresh forces a fresh authenticated load.

2. Account types and permissions

Role	Can do	Cannot do / reserved
Warehouse	View schedules; create normal scheduled bookings; record permitted Unscheduled Delivery; change operational status; open bookings; Priority.	Cannot create Unscheduled Delivery; cannot drag D
Planner	Create scheduled bookings; amend date/time, PO, pallets, weight; system	Cannot create Unscheduled Delivery; cannot drag D
Admin	Operational administration; suppliers; bay blocks; move/resize; corrections	Cannot create Unscheduled Delivery; cannot drag D
Developer	All privileged configuration: capacity/hours, handling rules, bays, accounts, schedules, bay blocks, data	Cannot create Unscheduled Delivery; cannot drag D

Planner in detail

- Planner can change scheduled date, requested/start time, PO reference, pallet quantity and weight.
- When Planner changes date/time, Dock Scheduler recalculates a valid bay rather than leaving an invalid allocation.
- Planner cannot change the calculated duration by resizing and cannot drag the Day View graphic.
- Planner cannot mark Arrived, Unloaded or Complete and cannot create an Unscheduled Delivery.

3. Dashboard - what every tile means

- **Today's Peak Pallets on Bays** - highest concurrent planned pallet occupancy on active bays today. It is not the simple sum of all deliveries.
- **Inbound Deliveries** - today's scheduled inbound activity.
- **On-Time Arrivals** - arrival performance using the recorded arrival timestamp; on-time tolerance is within 15 minutes.
- **Current Status** - live counts of Booked, Arrived, Unloaded and Complete.
- **Blocked Bays** - bays unavailable today.
- **Planned Pallet Workload** - scheduled pallet workload currently in the operation.
- **Attention Required** - outstanding operational actions due up to live time, including Arrived-to-Unloaded thresholds.
- **Recent Activity** - latest status movements today.
- **5-Day Pallet Capacity** - forward capacity by working day.

Important: Actual late completion is reporting data. It does not stretch the original planned slot on Day/Week/Month and does not change scheduling capacity retrospectively.

4. Create and find bookings

Create a normal scheduled booking

Access: Warehouse, Planner, Admin and Developer.

1. Choose New Booking from Bookings or the available New Booking control.
2. Select the supplier from the supplier master list.
3. Enter PO reference and the required delivery details.
4. Enter pallets and weight.
5. Choose the requested working date and requested time.
6. Review the delivery method, calculated processing window and allocated bay.
7. Choose Book Delivery and confirm.
8. Use the generated URN as the booking's unique reference.

Automatic method and duration

- Small Delivery is used within its configured small-pallet threshold and may share a designated Small Delivery bay within the shared pallet limit.
- LTL uses its configured maximum pallet threshold and an exclusive bay.
- FTL is the larger palletised method and uses an exclusive bay. FTL over 30 pallets is valid when it has its own bay and all capacity/availability rules pass.
- FCL uses the fixed 40-pallet planning equivalent and an exclusive bay.
- Processing time is calculated from pallets/hour with the configured minimum slot as the floor, rounded up to the next 15 minutes.
- Long planned windows continue across working days and skip weekends.

Find a booking

1. Open Bookings.
2. Use Search for URN, PO, supplier, bay or status.
3. Choose Search.
4. Open the correct row and verify URN before changing anything.
5. Use Clear to remove the search.

URN

URN is the sequential unique booking reference. It is designed to remain searchable even if other booking details later change.

5. Bookings list - filters, status, sorting, paging and export

Date and status filters

Date provides Today and All. Status provides **All, Unscheduled, Booked, Arrived, Unloaded and Complete**.

Unscheduled is a separate booking flag from operational status. Therefore an unscheduled record can correctly display **Arrived** - **UNBOOKED**, **Unloaded** - **UNBOOKED** or **Complete** - **UNBOOKED**.

Pagination

1. Apply search/date/status filters first.
2. Use Previous and Next in the pager when more results exist.
3. Changing a filter returns the list to page 1.

Sorting

Where a table heading is sortable, click the heading to sort by that field. Click again to reverse ascending/descending order.

Export

1. Apply the required filters/search.
2. Choose the Excel icon for spreadsheet output or PDF icon for PDF output.
3. Open the export and verify the selected records before sharing.

Note: Bookings and Admin > Bookings use the same full user-facing status wording, including the UNBOOKED suffix.

6. Edit, move and resize a scheduled booking

Edit from the booking controls

1. Open the booking.
2. Choose Edit/Amend Booking where permitted.
3. Change only the required fields.
4. If date/time changes, review the recalculated bay.
5. Save and verify the result remains after refresh.

Drag in Day View

Access: Admin and Developer only.

1. Press and drag the booking graphic.
2. Use the graphic's displayed destination as the placement guide rather than only the cursor position.
3. Release on the required valid bay/time.
4. Confirm the move if prompted.
5. Use Undo Last Change immediately if needed.

A move is rejected if it would violate availability, bay status/blocking, hours, overlap, capacity or other scheduling rules.

Resize in Day View

Access: Admin and Developer only.

1. Use the resize edge/control on the booking.
2. Extend or shorten the planned window.
3. Release at a valid boundary.
4. Verify the new planned slot.

Note: Releasing a resize does not open the booking popup. A deliberate normal click still opens it.

Undo Last Change

Undo is for the most recent eligible Day View move/resize operation. Use it immediately before making another scheduling change.

7. Day, Week and Month views

Day View

- Shows bay rows against configured opening/closing hours.
- Status colours: Booked, Arrived, Unloaded, Complete; blocked periods have their own block styling.
- Priority keeps the status colour and adds red diagonal hatching.
- Date can be changed with previous/today/next or the date picker.
- Capacity display uses peak concurrent pallets for the selected day.

Week View

Shows the working week with booking status and Priority styling. Use Previous, This Week and Next or choose a date.

Month View

Shows the broader working-day plan. Weekends are excluded from normal scheduling. Use Previous, This Month and Next or choose a date.

Why a bay may be missing/unavailable

- Bay is Inactive.
- Bay is blocked for that date/time.
- Bay is dedicated Small Delivery and the booking method is not eligible.
- Another exclusive booking occupies the window.
- Small shared-bay pallet limit would be exceeded.
- Site concurrent pallet capacity would be exceeded.
- Requested time/window falls outside configured hours.

8. Operational lifecycle - Arrived, Unloaded, Complete

The normal operational flow is **Booked -> Arrived -> Unloaded -> Complete**.

Book a lorry in / Mark Arrived

If a lorry already has a booking, do not create another booking. Open the existing booking and Mark Arrived.

1. Find/open the booking.
2. Choose Mark Arrived.
3. Confirm the arrival timestamp.

Mark unloading complete

1. Open the Arrived booking.
2. Choose Move Unloaded.
3. Confirm the timestamp and any prompted exception information.

Complete a delivery

1. Open the Unloaded booking.
2. Choose Complete Delivery.
3. Confirm completion.

Correct a status or timestamp

Access: Admin/Developer.

1. Open the privileged booking/status controls.
2. Choose the correction action.
3. Set the correct status/timestamp values.
4. Save Status Correction and verify.

Important: Planner cannot progress operational status.

9. Unscheduled deliveries

Use Unscheduled Delivery when a vehicle arrives without a planned appointment. This is not the same as creating a normal future booking.

1. Open Bookings and choose Unscheduled Delivery.
2. Enter supplier/reference and delivery details.
3. Choose an available bay as required.
4. Enter the required reason/note.
5. Save the delivery.
6. Continue the operational lifecycle as authorised.

The booking retains its UNBOOKED flag throughout its lifecycle, so completed records remain identifiable as **Complete · UNBOOKED**.

Important: Planner cannot create Unscheduled Delivery.

10. Priority bookings

Priority is an operational flag and does not change scheduling mathematics.

1. Open the booking popup.
2. Choose Make Priority.
3. Wait for the save.
4. Verify red diagonal hatching appears over the normal status colour in Day, Week and Month.
5. Choose Remove Priority later to clear it.

Priority does not override bay availability, blocks, time, calculated duration, pallet capacity or status rules.

11. Booking popup, photos and files

Responsive booking popup

The popup is designed to remain within the visible desktop, mobile-browser and installed-PWA viewport. Long content scrolls inside the popup so the header/actions remain accessible.

Add a photo

1. Open the booking.
2. Choose the camera/photo control.
3. Take a photo or select one.
4. Wait for processing/compression and upload.
5. Verify it appears in Attachments.

Attach paperwork/file

1. Open the booking.
2. Choose the file/paperclip control.
3. Select the required file(s).
4. Wait for upload.
5. Verify the attachment list.

Delete an attachment

1. Open the booking.
2. Identify the exact attachment.
3. Choose Delete beside it.
4. Confirm.
5. Verify only that attachment disappears.

Limits

- Up to 5 files can be selected in one batch.
- Maximum 20 attachments per booking.
- Final uploaded file must be 10 MB or smaller.
- Photos may be compressed to improve mobile performance and R2 storage use.

12. Reporting - filters and every report

Global Reporting filters

1. Choose From and To dates.
2. Optionally choose Supplier, Delivery Type, Bay and Status.
3. Choose Apply.
4. Use Reset to clear the report selection.

All Records

Detailed booking records across statuses. Search records by URN, PO, supplier, bay or status using Search; use Clear to remove the record search.

Overview

Headline totals including Deliveries, Pallets, Completed, Arrivals recorded and On Time percentage.

Supplier Performance

Shows Deliveries, Unscheduled count/%; Arrivals; On Time %; average early/late; Late; Completed; average turnaround and Pallets. Punctuality is measured against the allocated appointment time.

Dock Performance

Shows bay Deliveries, Completed, average bay time, Planned Hours, Actual Hours, average variance versus plan and Pallets. Actual bay time is measured from Unloaded to Complete.

Volume & Capacity

Shows daily deliveries, pallets, pallet capacity and utilisation. Carry-over is included only where the original calculated booking plan continues into that working day.

Exceptions

Highlights Unscheduled, Late arrivals, Not arrived, Long wait to bay and Process over plan, with status gap/from/to/variance detail.

Export Reporting

1. Apply the required filters.
2. Choose Excel or PDF in the Reporting header.
3. Verify the exported population before distribution.

13. Admin - Bookings

Admin > Bookings is the privileged booking list. It uses the same Today/All and All/Unscheduled/Booked/Arrived/Unloaded/Complete filtering and full status display as Bookings.

- Search/open records.
- Export filtered lists to Excel/PDF.
- Edit permitted booking details.
- Correct status/timestamps.
- Cancel/delete where authorised.
- Use the full operational status plus UNBOOKED flag to understand unscheduled records.

14. Admin - Suppliers

Add a supplier

1. Open Admin > Suppliers.
2. Search first to avoid duplicates.
3. Enter the supplier name.
4. Choose Add Supplier.
5. Verify it appears as Active and in the New Booking supplier dropdown.

Search/filter suppliers

Use the supplier search and Active/Archived status filter to find the master record.

Archive

Archive removes the supplier from new-booking selection while preserving historical booking text.

Restore

1. Include Archived suppliers.
2. Find the supplier.
3. Choose Restore.
4. Verify it is Active and available for new bookings.

Delete

Delete removes the supplier master record. Historical bookings retain their stored supplier text.

15. Admin - Block Bays and Activity Log

Block a bay

1. Open Admin > Block Bays.
2. Select the bay.
3. Choose single-date, date-range or permanent blocking mode.
4. Set date/time values as required.
5. Choose a reason and optional detail.
6. Choose Block Bay and confirm.

Unlock

1. Open Current Blocked Bays.
2. Find the correct block.
3. Choose Unlock/remove.
4. Confirm.

Activity Log

1. Open Admin > Activity Log.
2. Search by user, action, booking, supplier or detail.
3. Choose Refresh when you need the latest transactions.
4. Match timestamp, user and target to the event being investigated.

16. Developer - Capacity & Hours

- **Max pallets on bays at one time** - site-wide concurrent pallet capacity used by scheduling/capacity displays.
- **Pallet warning %** - warning threshold before maximum capacity.
- **Opening time / Closing time** - normal scheduling hours.

1. Change only the intended value.
2. Choose Save Developer Settings.
3. Verify the persistence message and resulting scheduling behaviour.

Performance Test Data

Generate 1,000 Test Bookings creates realistic TEST data using live rules, with no more than one FCL per working day and peak site capacity around the configured limit. Test URNs do not consume the live URN sequence.

Danger Zone - Clear All Bookings

Important: Clear All Bookings removes booking records only. Accounts, bays, suppliers, settings and URN sequence are retained. Do not use casually on live data.

17. Developer - Handling Rules

Processing-time controls

- **Pallets / hour** - workload rate used in calculated processing time.
- **Minimum slot hours** - floor below which the calculated slot cannot fall.
- Times are rounded up to the next 15 minutes.

Small Delivery

Shared bay permitted. Maximum pallets identifies the Small method threshold; Shared-bay pallet limit controls combined overlapping Small pallets on the Small Delivery bay.

LTL

Exclusive bay. Uses configured pallet rate, minimum slot and maximum-pallet threshold.

FTL

Exclusive bay. Processing time is the greater of pallet workload time or configured minimum slot.

FCL

Exclusive bay. Uses the fixed 40-pallet planning equivalent.

Arrived -> Unloaded Action Required thresholds

Important: Small Delivery / LTL / FTL / FCL minute fields in this section are **alert thresholds**, not booking-duration calculations.

If a delivery remains Arrived beyond its method threshold, Day View flags Action Required until it is marked Unloaded.

18. Developer - Bay Configuration

Add a bay

1. Enter New bay name.
2. Choose Add Bay.
3. Set the required Status.
4. Choose Save Developer Settings.

Rename a bay

1. Find the bay.
2. Edit Name.
3. Choose Save Developer Settings.
4. Verify the new name in scheduling/allocation.

Bay Status

- **Active** - normal eligible bay.
- **Small Delivery** - designated Small Delivery bay used by Small allocation/sharing rules.
- **Inactive** - removed from normal allocation and calendar availability.

Delete a bay

1. Find the bay.
2. Choose Delete Bay.
3. Read the warning concerning bookings/blocks.
4. Confirm only if intended.
5. Save/verify configuration.

19. Developer - User Accounts

Create

1. Open Developer > User Accounts.
2. Enter Username, Display name, Account type and a password of at least 8 characters.
3. Choose Create Account.
4. Verify it appears in the account list.

Filter and refresh

Filter by Account Type. Choose Refresh to fetch the latest server-backed account list before reviewing/editing when required.

Change account

Edit the permitted account fields and Save.

Disable

Turn off Enabled and save. Disabled accounts cannot sign in.

Reset password

Use Reset password only when a password change is intended; enter the new password and save.

Delete

Choose Delete on the intended account and confirm carefully.

20. Developer Audit, security and concurrent editing

Developer Audit Log

1. Open Developer > Audit Log.
2. Choose Refresh.
3. Review Date, Developer, Action, Target and Detail.

Concurrent booking edits

Booking writes use version checks. If another user saved a newer version first, the stale copy is rejected rather than silently overwriting the newer data.

1. Stop when the newer-change/reload message appears.
2. Reload the booking.
3. Review the latest values.
4. Reapply your intended change if still required.
5. Save again.

Single-device account session

One account is restricted to one active device/session. If the account is active elsewhere, the app can require access to be moved to the current device; the previous device is invalidated.

Different users

Different named users can work at the same time. Version protection prevents stale booking writes from silently replacing newer changes.

21. Mobile browser and installed PWA

Install

- iPhone/iPad: Safari > Share > Add to Home Screen.
- Android: Chrome > Install App/Add to Home Screen.
- Windows: Edge install icon or Edge menu > Apps/Install.

Installed app layout

The installed mobile view respects safe areas/Dynamic Island, uses fixed bottom navigation, keeps Sign Out/version accessible and uses viewport-safe booking popups.

Pull to refresh

Pull down in the installed/mobile experience to force a fresh authenticated data load. It should not intentionally take the user to the login screen.

Browser vs installed app

Standalone PWA layout can differ from browser layout because it uses safe-area and standalone display rules. The controls and data remain the same.

22. Troubleshooting

Problem	What to check
Cannot sign in	Username/password, account Enabled state, current active-device/session rules.
Supplier missing	Admin > Suppliers; include Archived; restore if appropriate; then verify New Booking dropdown.
Bay missing/unavailable	Developer Bay Status, Admin blocks, method eligibility, overlap, opening hours and capacity.
Planner cannot drag/resize/status	Expected Planner restrictions; use permitted booking-form amendments.
Save rejected	Another user may have changed the booking; reload latest version and reapply.
Complete unscheduled only says Complete	Current lists should display Complete · UNBOOKED; confirm current app version/data refresh.
Attachment failed	Check file size, batch/count limits and network; retry the specific attachment.
Popup too tall	Current popup scrolls internally and is viewport-safe; confirm current version.
App seems stale	Change tab for background refresh or use pull-to-refresh for a forced refresh.
App looks wrong after update	Confirm version, refresh/reopen PWA, then retest before changing data.

23. Help Search - examples of natural questions

Help Search accepts normal language. The following are examples of wording that should route to the correct task:

- “lorry is here”, “driver arrived”, “book it in” -> Mark Arrived.
- “finished unloading”, “offloaded”, “tipped” -> Mark Unloaded.
- “lorry gone”, “job done”, “finish delivery” -> Complete.
- “turned up with no booking”, “unexpected lorry” -> Unscheduled Delivery.
- “complete unbooked”, “show unscheduled”, “unbooked filter” -> Unscheduled filtering/status.
- “move booking”, “drag to another bay”, “change bay/time on day view” -> Drag booking.
- “make slot longer”, “resize booking”, “shorten slot” -> Resize.
- “delete photo”, “remove paperwork”, “delete attachment” -> Delete attachment.
- “supplier missing”, “can’t find supplier” -> Supplier troubleshooting.
- “rename bay”, “change bay name” -> Rename bay.
- “small delivery bay”, “small-only bay” -> Small Delivery bay status.
- “export bookings”, “bookings excel”, “admin booking PDF” -> Booking-list exports.
- “search all records”, “find record in reporting” -> Reporting All Records search.
- “refresh users”, “latest account list” -> Refresh User Accounts.
- “who changed this?”, “audit booking”, “activity log” -> Activity/Audit.
- “why save rejected?”, “someone changed booking” -> Concurrent edit/version protection.
- “what do FTL minutes mean?”, “arrived unload threshold” -> Action Required thresholds.
- “why can’t planner complete?”, “planner can’t resize” -> Planner restrictions.
- “install on iphone”, “add app to home screen” -> PWA install.