Daily Planner User Guide (v26.1)

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About Daily Planner

Appian Daily Planner Overview

Appian Daily Planner (ADP) is a cloud-based Route optimization and editing tool. It provides top-notch features for planning such as Dynamic Routing, Geocoding, resources for managing Orders, and tools to customize and refine Routes and Stops to fit every user's needs. ADP requires a license and is intended for one dispatcher per branch at a given time.

Find support for ADP by clicking on the Question Mark in the application toolbar, or view additional documents here.

- Visit the Resources section to find specific links to other ADP documents, training, and more.
- Daily Planner works best in Google Chrome. Other browsers (e.g., Mozilla Firefox, Microsoft Edge) are unsupported.

Navigating Daily Planner

The Daily Planner has dedicated pages and panels for all of your Route planning requirements. The following list briefly describes where to locate information and each pages' main focus. Use section icons to correlate back to the application. Click on the links for a deep dive into each topic.

- **Header Menu items** — A toolbar containing the following items from left to right:
  - **Sidebar** — Click on the hamburger button (three lines) to access other topics (See *Figure 1* below):
    - Organization and Management — Manage Branches, Assets, and Trucks.
    - Dashboard — View map, bar charts, and Route chart for the selected dispatch day(s).
    - Route Planning — Build Routes from unloaded Orders or view previously built Route cards.
    - Dispatch — Assign Drivers, Devices, and Assets to Routes.
    - Boundaries — View boundary groups and upload boundaries from files created in DRTrack.
    - Fixed Routes — View and edit stored fixed Routes.
    - Points of Interest (POI) — Create and manage points of interest.
    - Accounts — View and edit customer accounts.
    - Preferences — Adjust Daily Planner preferences and other options.
  - **Branch and Date** — A list of Branch names, dispatch date range, and options for displaying Branches.
  - **Order Search** — Search for both loaded and unloaded Orders on your current Branch.
  - **Announcements** — View all notifications, including product updates here.
  - **Support** — Easy access to Customer Support.
  - **Appian and Trimble Maps products** — Click on the Bento menu (set of boxes in ADP's toolbar).
- **Footer Summary Statistics** (for the Branch and date selected)
  - **Unloaded orders** — Summarizes any unloaded Orders.
  - **Routes** — Displays information about any built Routes.

Organization & Management

Organization & Management is the Daily Planner page with links used to set up and manage your organization's Branches, Assets, and Trucks. See the User Permissions Table for permissions required.

1. Click on the three lines in the top left corner.
2. Scroll down to *Organization & Management* to start managing your fleet.

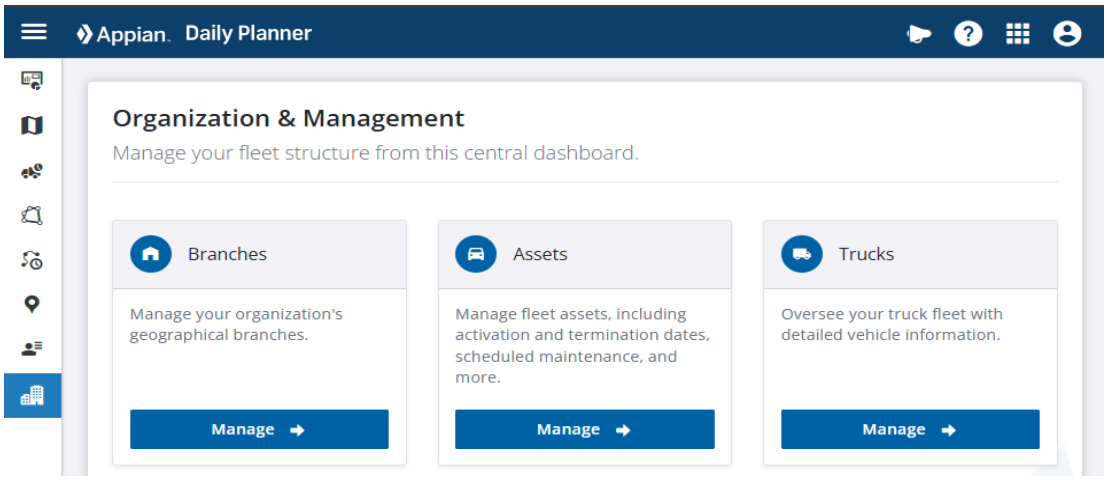

Figure 1 - Organization & Management page

Branches

Branches are the physical distribution locations where Assets (vehicles) are dispatched. Organizations can set up one or multiple Branches. The *Branches* page displays a list of your Branches and their locations on a map.

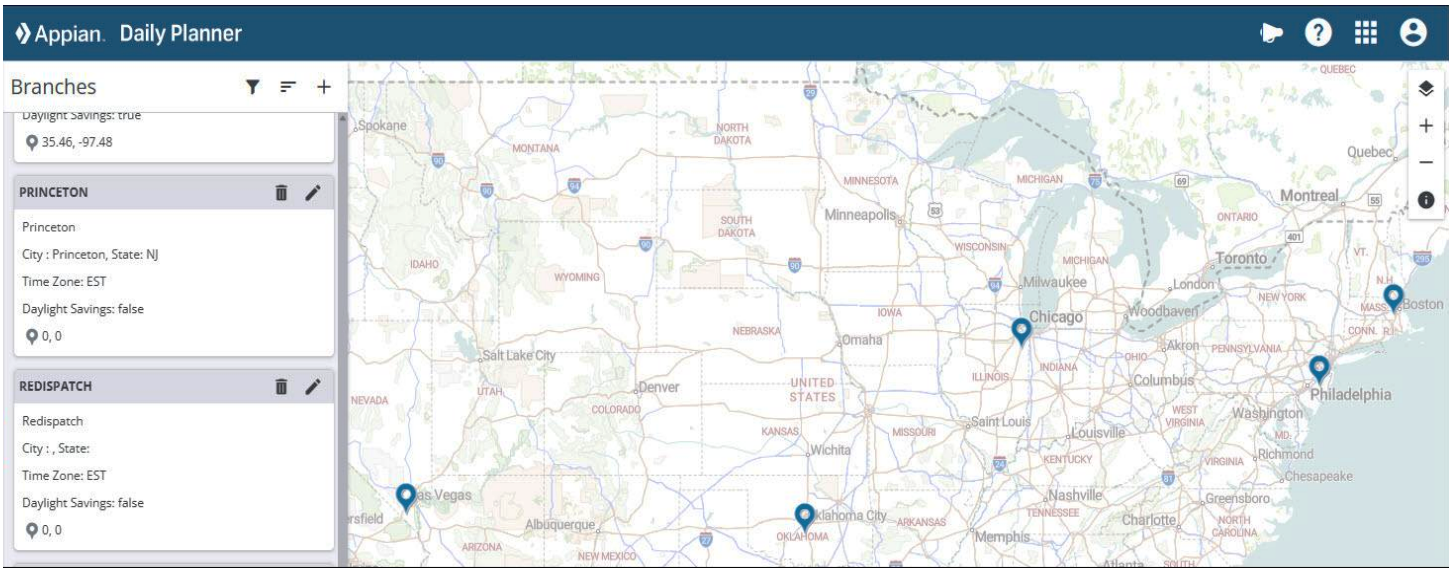

Figure 2 - Organization & Management - Branches map

Add a Branch

Creating a Branch is the first step in building and optimizing your Routes. Without a Branch, users cannot assign Assets, Drivers, and Devices, or load Orders and organize Stops.

Click on the + button at the top of the *Branches* page to open the *Create Branch* window (see *Figure 4* below).

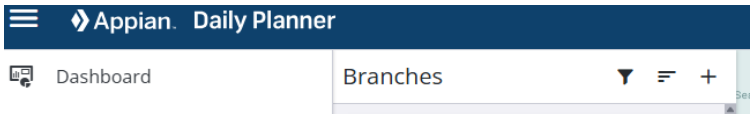

Figure 3 - Create a Branch +

1. Enter the Branch information — Branch ID is required, but it is recommended to complete all fields in the form.
2. Check the *Auto Log Off with End Terminal* box to allow drivers to automatically log off a Route when it crosses the branch's end terminal geofence (latitude and longitude).
3. (Optional) Drag the blue Branch pin to the correct location on the map to pin it, or enter its GPS coordinates.

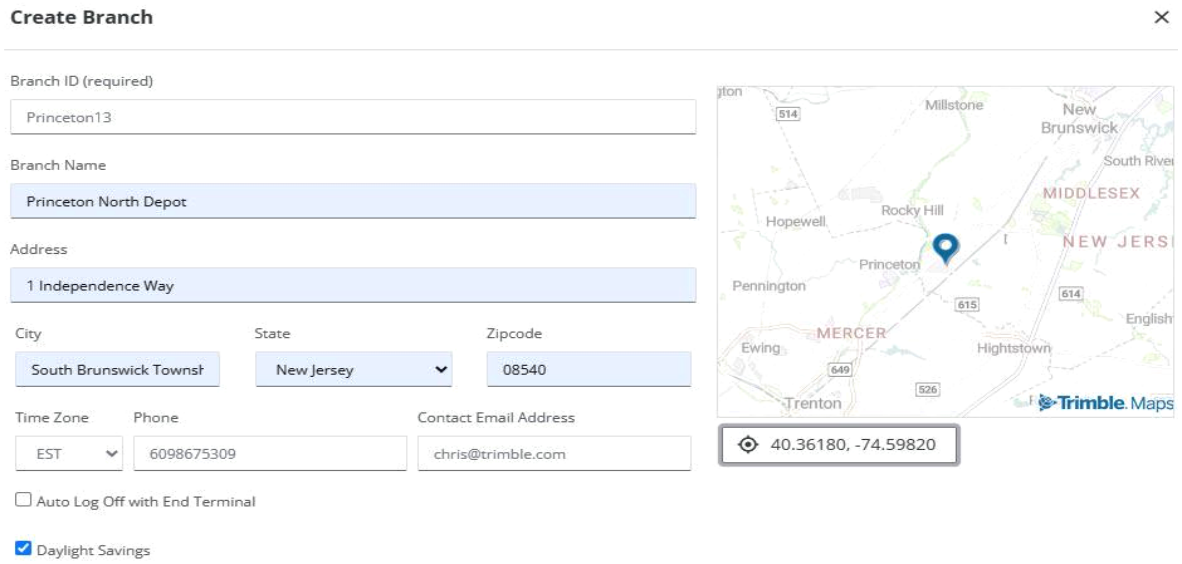

Figure 4 - Create New Branch window

4. Click on *Create* at the bottom to finish and add the new Branch card on your list.

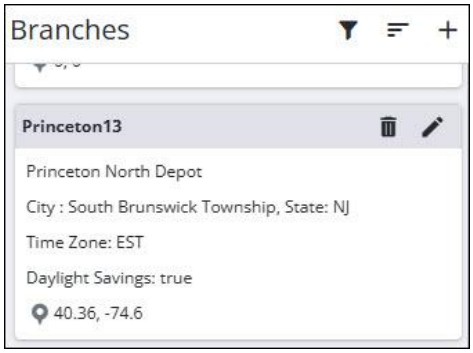

Figure 5 - Branch card within a list

Edit or Delete a Branch

1. Navigate to the *Branches* list.
2. Scroll to find the desired *Branch* card (see *Figure 5* above).
3. Select one of the following — Click on the trash can to **delete** the Branch, or the pen to **edit** a Branch.

Filter Branches

Narrow your *Branch* list with filter options so only specific Branches appears:

1. Click on the filter button at the top of the *Branches* page and select *Filter*.
2. Select how your search term is applied to that field (e.g., Contains).
3. Enter your search term (e.g., Princeton).
4. Click on *Add*.

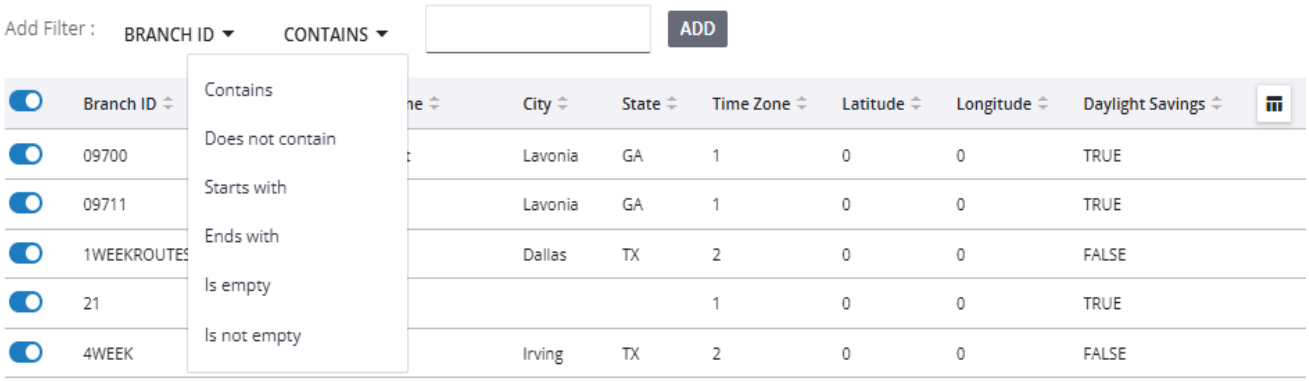

Figure 6 - Branch filter options

5. Select *DONE* at the bottom of the screen when you are done using the Filter tool.

Sort Branches

Sort all Branches so they appear in a particular order.

1. Click on the Sort button.
2. Select how you want to organize your list of Branches (e.g., by Time Zone, Branch Name).
3. Click on *Reset to Default* to delete the selected sort options.

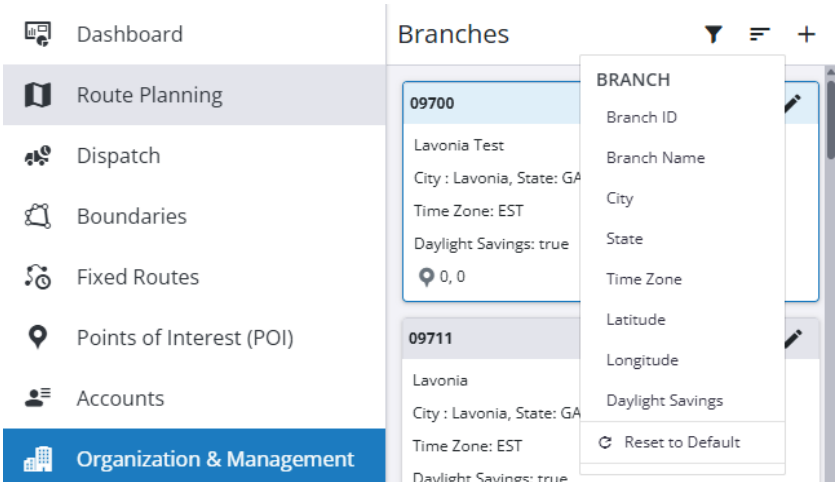

Figure 7 - Branch sort and filter options

Assets

Daily Planner uses the terms *Assets* and *Trucks* to differentiate between the fleet's actual vehicles (Assets), and the set of rules (Trucks) the routing algorithm uses to build Routes for those Assets.

Each Asset has a name and type, created by the user, in a format that best identifies and sorts vehicles in Daily Planner.

Figure 8 - Assets page with Name and Type

Create An Asset Type

Create Asset Types for all of the Assets in your fleet before adding an Asset.

1. Click on the gears button (*Show Asset Types)* at the top right of the *Assets* page to view available Asset Types.

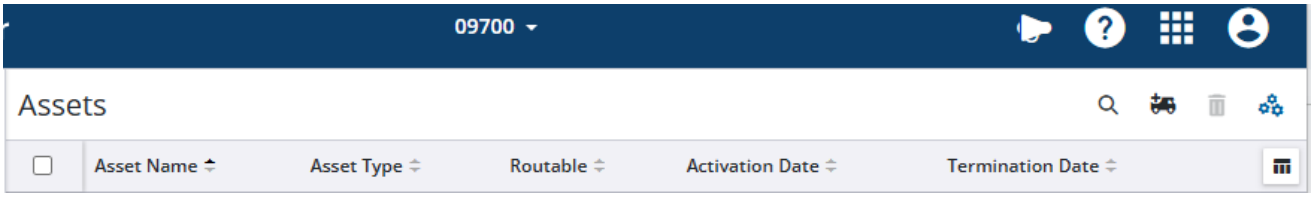

Figure 9 - Show Asset Types button (gears)

2. Select the **+** button (*Create Asset Type)* at the top of the *Asset Types* panel to create a new Type.
3. Enter an Asset Type name that best describes the **type of vehicle** in your fleet.
   - Types are a standard, shared description of the vehicle (e.g., Box, Lift, Semi).
4. Uncheck the *Routable* box if you **do not** want to add the Asset for routing.
5. Click on *Create* to finish and add an Asset
   - Continue creating Asset types until you have your entire fleet entered.

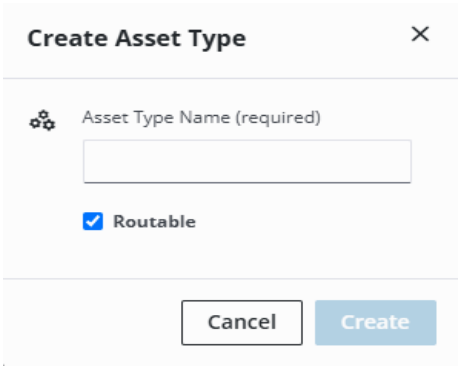

Figure 10 - Create an Asset Type window

Add an Asset

1. Click on the truck button (*Create Asset)* at the top of the *Assets* page.

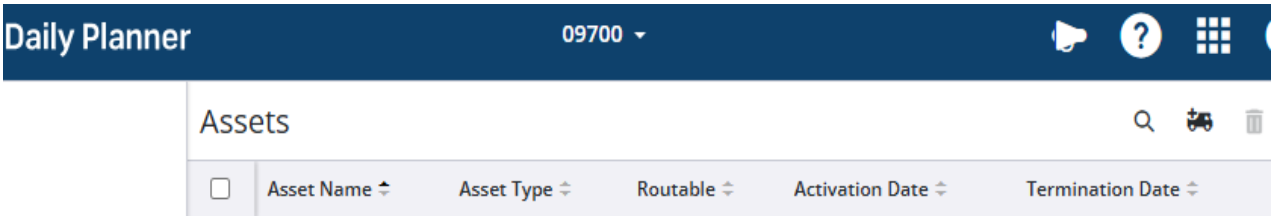

Figure 11 - Asset page - Create a new Asset

2. Enter the Asset information (all fields are required):
   - **Asset Name** — Unique Vehicle identifier within the Branch.
   - **Asset Type** — Vehicle type created in the section above (e.g., Semi, flatbed, crane).
   - **Activation Date and Termination Date** — Dates automatically default to a 10-year period from today's date.
3. Uncheck the *Show on Route Calendar* if you **do not** want the Asset to appear on the calendar for planning.
4. Click on *Create* to finish and add the Asset to the *Assets* table.

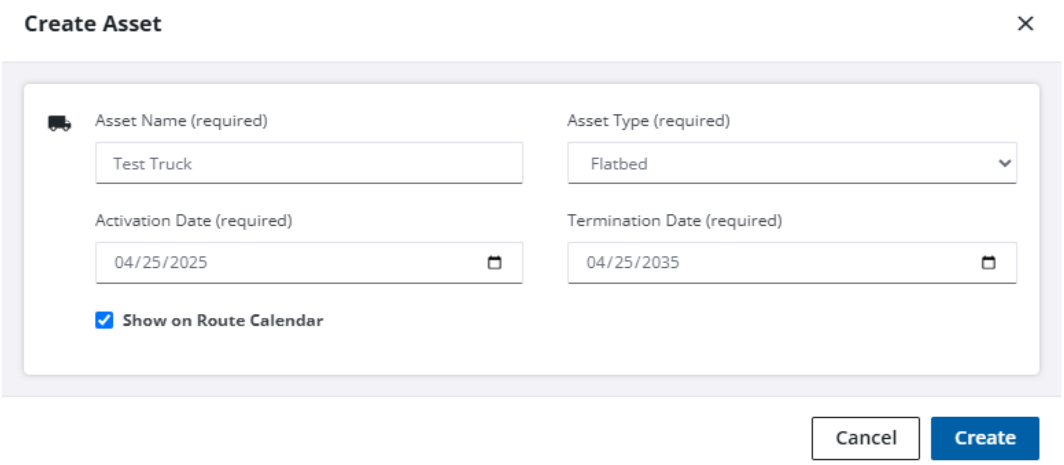

Figure 12 - Create Asset window

Delete an Asset

1. Hover over the Asset you want to delete until a pencil and three dots appear to the right of the Asset's row.
2. Select the three dots
3. Click on the *Delete Asset* box
   - If an Asset is deleted while it is assigned to a Route, it will remain on that Route. However, it won't be available for future assignments.

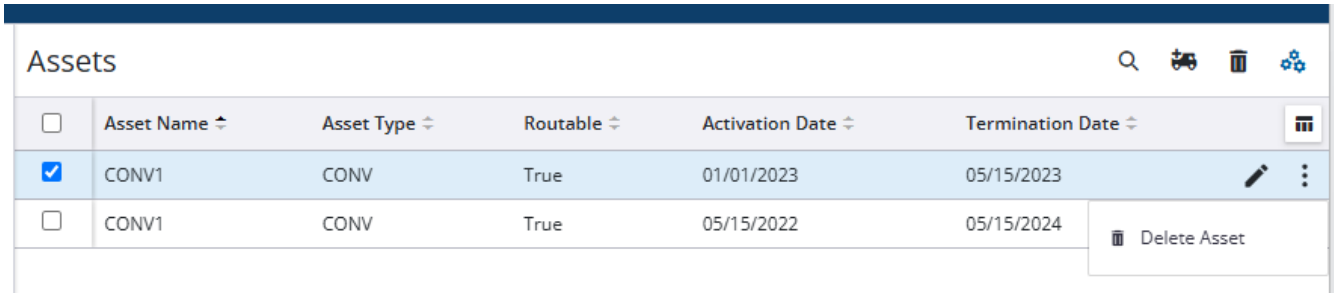

Figure 13 - Edit or Delete Asset

4. Click on *Yes* to confirm your Delete decision.

Edit an Asset

1. Hover over the Asset you want to edit until a pencil and three dots appear to the right of the Asset's row in the table.
2. Select the pencil to open the *Edit Asset* box.
3. Change any of the following: Asset's name, type, and activation and/ or termination dates (See *Figure 13* above).
4. Click on *Save* to finish editing.

Add Asset Maintenance

Add Assets to a maintenance schedule to prevent them from being included in a Route when they are out of service.

1. Hoover over the Asset and click on the Edit pen (See *Figure 13* above).
2. Enter a start date, end date, and time for the maintenance.
3. Check *Recurring event* if the maintenance is regularly scheduled.
   - Select the maintenance frequency, if the *Recurring Event* box is selected.
4. Add maintenance description (e.g., oil change and tire rotation).
5. Select *Add Maintenance* to add it to the Asset's maintenance log.
6. Click on *Save* to finish adding.

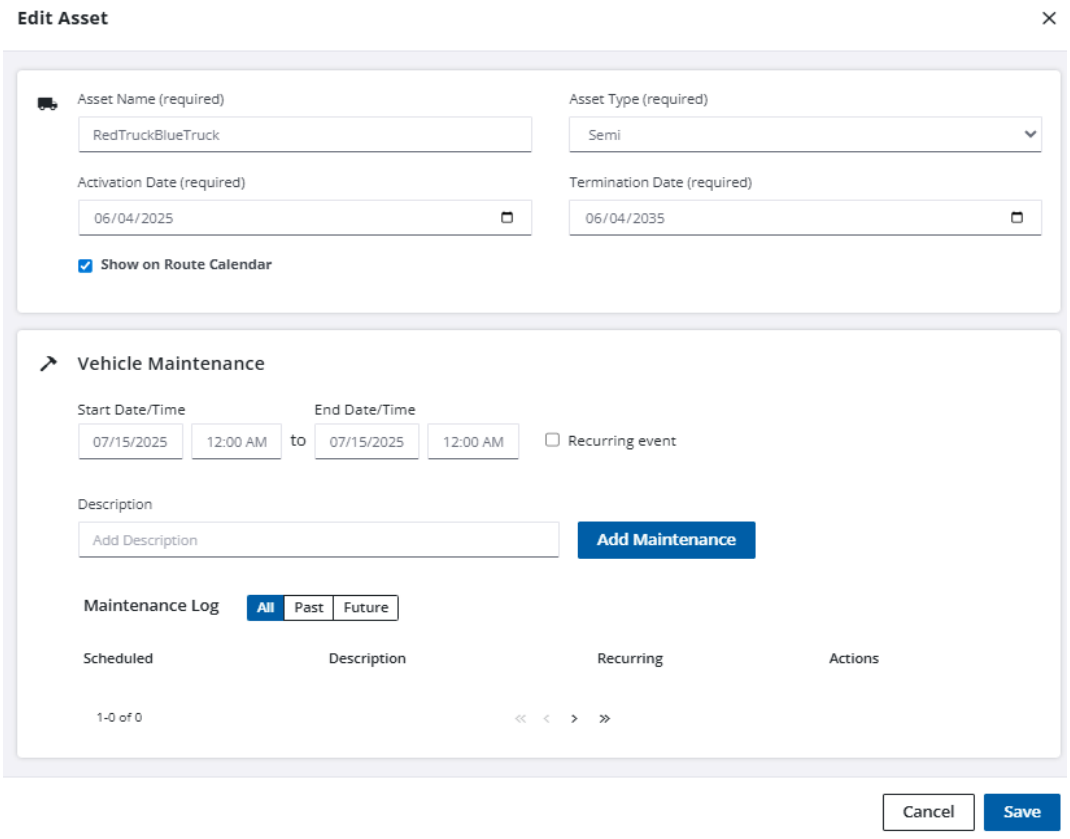

Figure 14 - Asset Maintenance window

Search or Filter Assets

Search or filter the display of Assets in the *Assets* page table using the features shown below.

1. Click on a column header to organize the chart in ascending or descending order.
2. Click on the magnifying glass to search for an Asset by name.
3. Click on the Configuration button in the upper right to select the information to display in the *Assets* table.

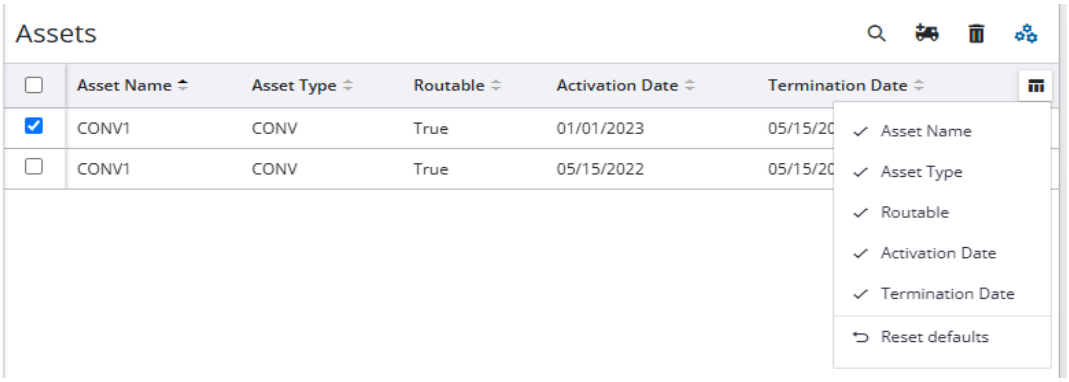

Figure 15 - Asset search and filter options

Trucks

A **Truck** is a collection of settings that govern how a Route is built. It uses dozens of data to optimize the algorithm and generate an efficient Route e.g., type of Asset (vehicle), hours of availability, costs, and special equipment, etc.

- View the Trucks for the selected profile using the Truck Profile table.
- Add and remove table columns by clicking on the Layout Configuration button to the right of the headers.

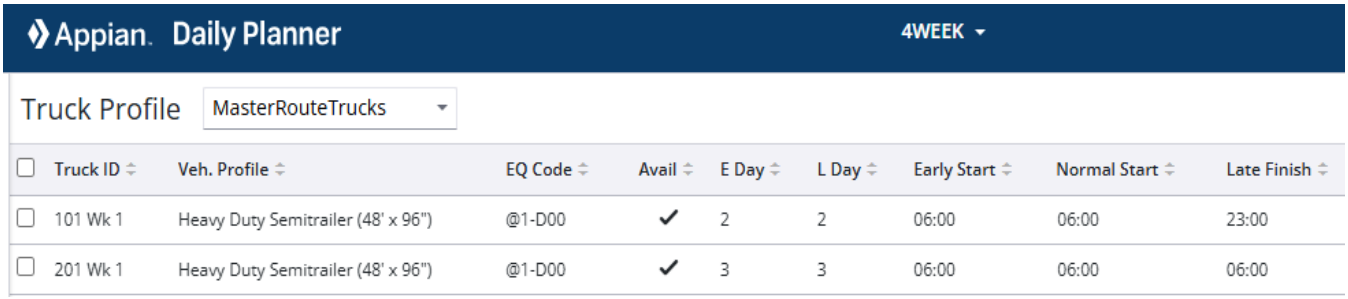

Figure 16 - Truck Profile page

Create a Truck Profile

Create a Truck Profile to organize Trucks into groups to easily find and manage them. Create a Truck profile before adding a Truck.

1. Click on the More Menu (three dots) on the top right of the *Truck Profile* page.
2. Select + *Add Truck Profile.*

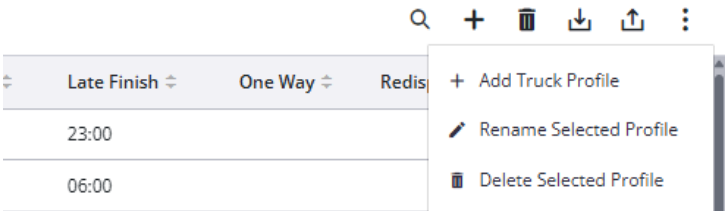

Figure 17 - Add Truck Profile Option

3. Enter a Truck Profile name and click *Save*.

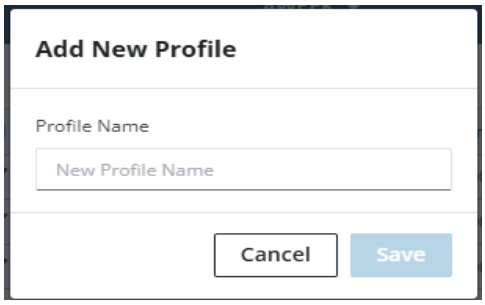

Figure 18 - New Profile window

4. Edit a Profile name or delete a Truck Profile using the same More Menu (See *Figure 18* above).
   - If you delete a Truck Profile, **all the Truck records associated with that Profile are also deleted.**

Add a Truck

Trucks establish rules for the Truck Profile to improve planning efficiency and refine routing optimization.

1. Select the Truck Profile you wish to add a Truck to from the drop down menu.
2. Click on the + Plus button at the top of the *Truck Profiles* page to add a new Truck.

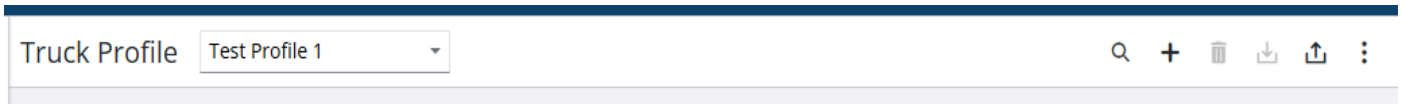

Figure 19 - Add new truck button

3. Enter the Truck name.
4. Determine if you will create a Truck from Scratch or Copy from an Existing Truck.
   - If you choose to **Create from scratch**, click on *Create.*
   - If you want to **Copy from an Existing** Truck (all the Truck rules), choose a Truck from the drop down menu.
     - If you do not have an existing Truck, you will not have the option to Copy.

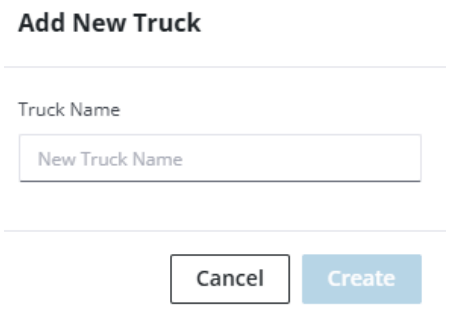

Figure 20 - Create new Truck

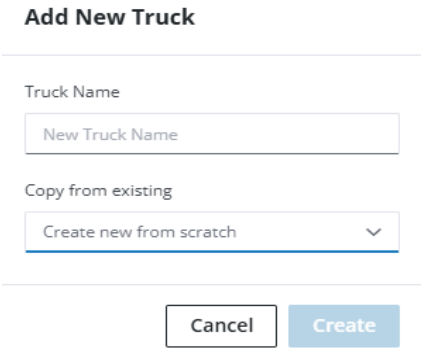

Figure 21 - Copy from existing Truck

5. Click on *Yes* to confirm the new Truck creation.

6. Enter the information in the *Create Truck* window.
   - **The Truck ID** — Auto populates and is the Truck name you entered in step 3.
   - **Truck Profile** — (Required) Tells the routing algorithm the type of Asset being routed.
   - **Truck City** — (Required) Address of the Branch where Assets are dispatched.
7. Ensure *Availability* is toggled on (blue) to include the Truck in routing options.
8. Customize your Truck — Enter *Work Rules*, *Cost*, *Volumes & UserFields*, and *Configurations* to create general rules Routing must follow when selecting the truck. If the rules are broken, violations occur (See Prescriptive Intelligence).

   Work Rules — Establish rules the Truck must follow on a Route e.g., maximum miles or drive time, when breaks can start, and the duration of layovers.
   - **Earliest Day** — The earliest date an Asset may depart based on the established dispatch date.
     - E.g., The Date of Dispatch is day 1. Enter a 1 in this field if the Assets can leave on the first day.
   - **Latest Day** — The latest date an Asset can return to the terminal calculated from the dispatch date.
     - E.g., A weekly Route might also have an *Earliest Day* of 1, but a *Latest Day* of 7.

   Cost — Vehicle and labor costs per mile, load, hour, and overtime used to calculate the Route's expenses

   Volumes & UserFields — Values to define truck capacity and user profiles for precise routing and statistics

   Configuration — Works with Preferences to create specific routing scenarios like **Remote Redispatch**.
9. Click on *Create* to finish.

Delete a Truck

Deleting the Truck does not impact the current Route or the Master Truck Record.

1. Follow the Edit a Truck steps to get to the Edit Truck Window.
2. Click on the *Delete Truck* button at the bottom of the window, and click the *Yes* confirmation button to finish.

Edit a Truck

Ensure your Truck and Truck profiles are updated as your Assets (fleet) changes to fully optimize your algorithms:

1. Scroll or filter until you locate the Truck ID you wish to edit and click when highlighted.

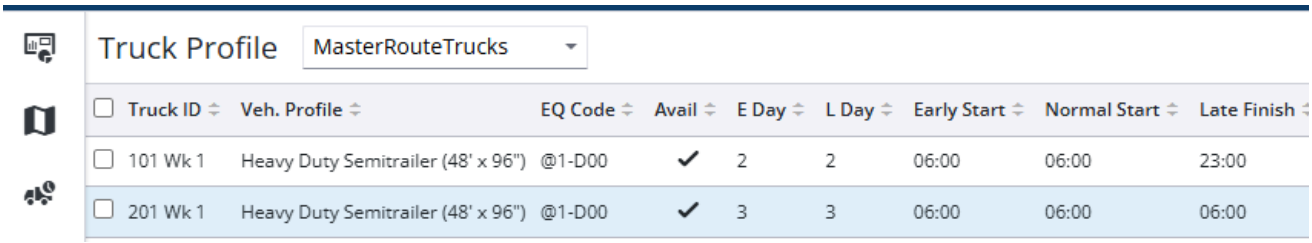

Figure 22 - Truck Profile table

2. Edit the necessary Truck info in the *Edit Truck* window (does not impact Master Record), and click on *Save*.

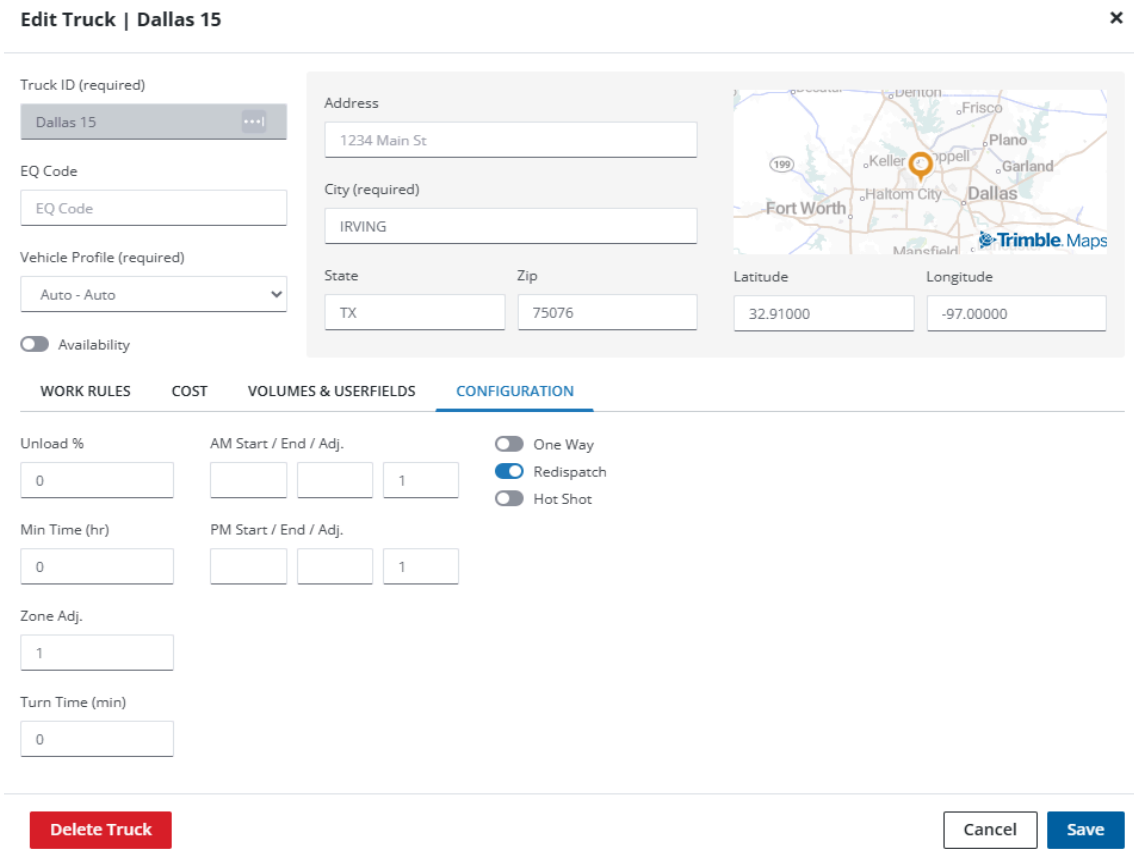

Figure 23 - Edit or Delete a Truck window

Search and Sort Truck Records

Search or sort through Truck records to find a specific Profile.

1. Click the magnifying glass at the top-right of the *Truck Profile* page to search using a key word.
2. Click any column header to sort in ascending or descending order. Slide headers left and right to organize the order.

Upload a Truck Master Record

A Truck Master Record is a comma-separated values file (CSV), which contains all the necessary Truck information. This option allows the user to make large, sweeping changes to their fleet.

1. Click on the Upload button in the top right of the *Truck Profile* page.

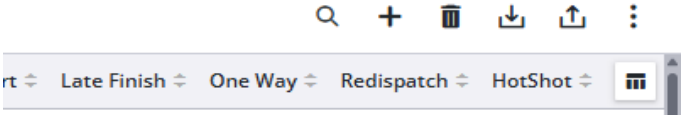

Figure 24 - Record Import and Export buttons

2. Click on the link at the bottom of the *Import Trucks* window to download the template and **create a new record** or Skip to Step 3 to **upload an existing record**.
   a. Open the template in your favorite spreadsheet application (e.g. Excel).
   b. Add all relevant Truck information.
3. Upload the Truck Master record.
   a. Click *Choose file to Upload* to locate the file on your computer, or drag the file to the window.
   b. Review the Truck IDs in the preview window and check the IDs you wish to update or add with the import.
4. Click on the *Save* button to start using the Truck record.

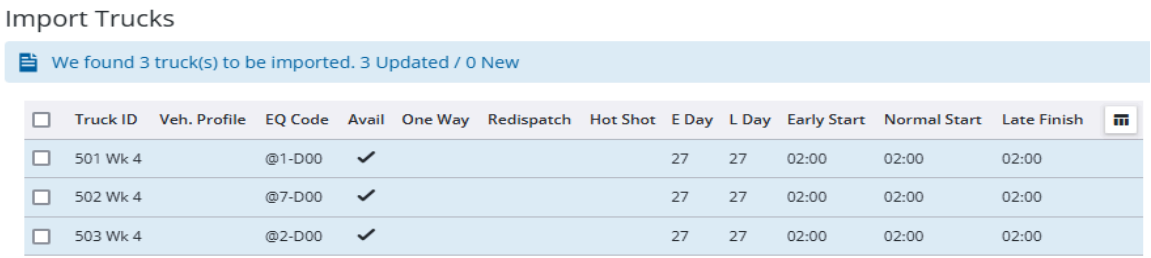

Figure 25 - Import Truck Records window

Download a Truck Master Record

1. Check the boxes next to each Truck ID.
2. Click the *Export Trucks* button to download to your browser's default location (usually your Downloads folder).

Add a Driver

Drivers must be created in DRTrack or they will not appear in the Daily Planner.

1. Click on the *Admin* menu at the top of the DR Track window.
2. Click on *Dispatch*, then *Drivers*.
3. Select the correct Branch from the list then click on *+Add New* at the top.

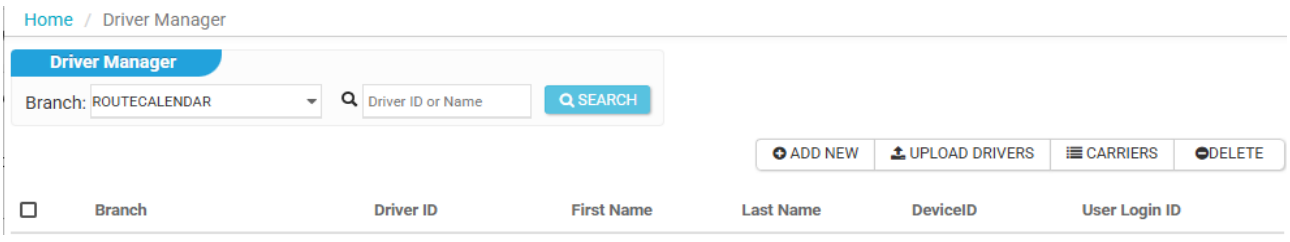

Figure 26 - Add new Driver information in DRTrack

4. Enter all Driver information.
   - Enter the Truck record in the DriverID field to create a link between the Asset and the Driver when planning.
5. Check the *Show on Calendar* box.
6. Click on *Save* to start using the Driver in Route planning.

Add a Device

Devices are created using the Telematics/Mobile integration your organization is using. Each Driver requires a Device that has been set up in DRTrack.

1. Click on the *Admin* menu at the top of the DR Track window.
2. Click on Upload Devices to import Device information, or click on the + *Add New* button.
3. Enter all the Device information.
4. Click on *Save* to start syncing Routes to the Device.

Dashboard

The Dashboard displays Route, Stops, and Driver information for the selected dispatch day using the GPS data relayed from the Driver's devices. Use three different visuals to gain insights — Map, Routes and Driver graphs, and Routes and Stops Charts. Use the Footer for quick statistics. If there is no GPS data, the Dashboard map and charts are blank.

Dashboard Map

View the current location of all the Assets, assigned to Routes, that are in progress on the expandable map, including:

- The Driver's last position when they logged out of (or completed) the Route.
- The progress of the Route — Green Assets are on time or ahead of schedule; red Assets are behind schedule.
  - The outer icon ring indicates the percentage of the Route that is complete.
- The Driver's current activity indicated by the shape in the color-coded circle.
  - Square — Driver is stopped
  - Triangle — Driver is moving with a compass heading
  - Check — The Route is complete

Click on the circle to see the Route name, start time, on-time indicator, odometer reading at the beginning of the Route, and last reported GPS location.

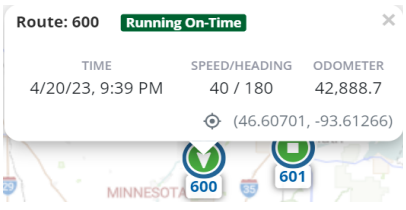

Figure 27 - Driver is on time, moving at 40 MPH at 9:39 PM

Examples and explanations of the map's Asset icons:

Icon indicates Route 571 is ahead of schedule, in motion, heading north, and about 80% complete.

Icon indicates Route 544 finished (logged out) ahead of schedule and 100% complete.

Icon indicates Route 501 is stopped, ahead of schedule, Driver is still logged in, and 100% complete.

Icon indicates Route 575 is stopped, behind schedule, and approximately 50% complete.

Icon indicates Route 587 is in motion, heading south, behind schedule, and about 75% complete.

Icon indicates Route 417 finished (logged out) behind schedule, and 100% complete.

Click on the map **?** to display the legend for more icon descriptions

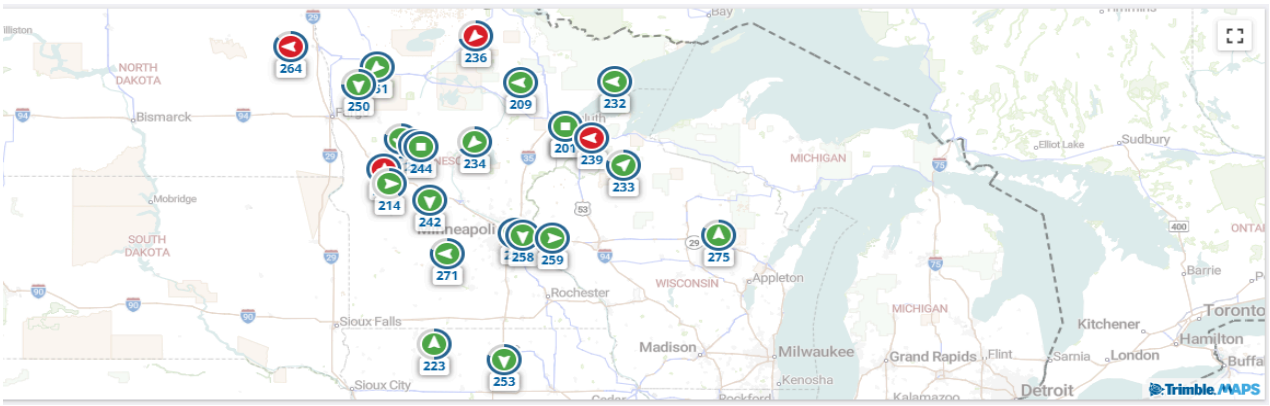

Figure 28 - Asset locations on Dashboard map

- Use the Show on Map tool to toggle between views — Completed Routes, GPS breadcrumbs, or Other Routes.
  - Toggle on the *Completed Routes* option to hide all completed Routes on the map.
  - Toggle on *Other Routes to* show all active Routes. Toggle off to show only the current Route.

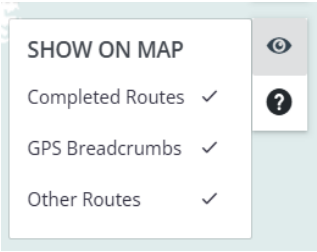

Figure 29 - Show on Map options

  - Toggle on *GPS Breadcrumbs* to display each GPS ping in the Route as a green circle on the map.

- Select a circle to see details at the time of the ping — the Asset's speed, the header, and the odometer. Information available is based on your GPS Integration option.

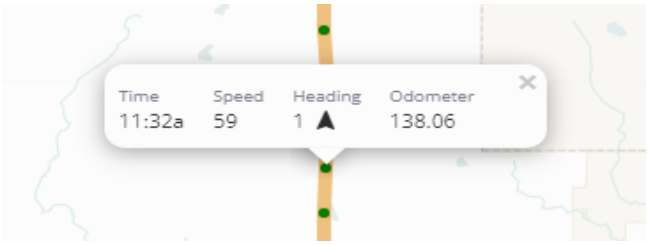

Figure 30 - Example of GPS pings in a Route

Routes and Drivers Graphs

Toggle between *Routes* and *Drivers* (bottom) to see detailed real-time tracking in an expandable graph.

- Stops are represented as circles — remaining Stops are outlined; completed Stops are color-filled.
  - Green Stops — On time, ahead of the estimated schedule, or delivered early.
  - Red Stops— Behind the estimated schedule or delivered late.
  - Current time is indicated by the blue vertical line topped with a truck icon.
- Right-click on the Stop circle to view Stop Details or Stop Summary in DRTrack or edit the Stop in ADP.
- Use sort and filter tools to refine the Route list from top to bottom (E.g., by Route status or Dispatch info).
- Routes longer than 31 days are not displayed on the graph.
- Expand Route rows in the graph to compare actual Stop times to planned Stop times. The planned Route appears below the actual Route.

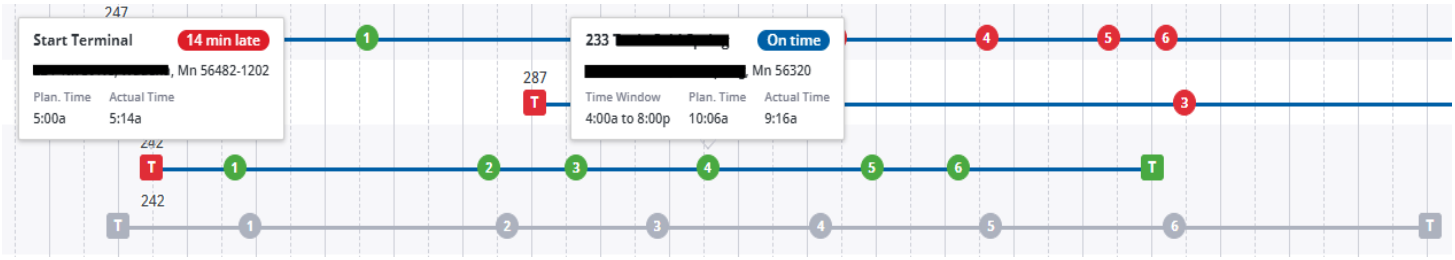

Figure 31 - Driver graph showing Stops ahead of schedule despite a late start

Route and Stops Charts

Assess the health of each Route and Stop as they progress using these charts and tables in the right panel.

- Toggle between *All* or *Remaining* to narrow the view to just the Routes and Stops not completed.
- The number in parentheses represents the total number of Routes or Stops while the number in the color-coded blocks represents the number for that particular category.

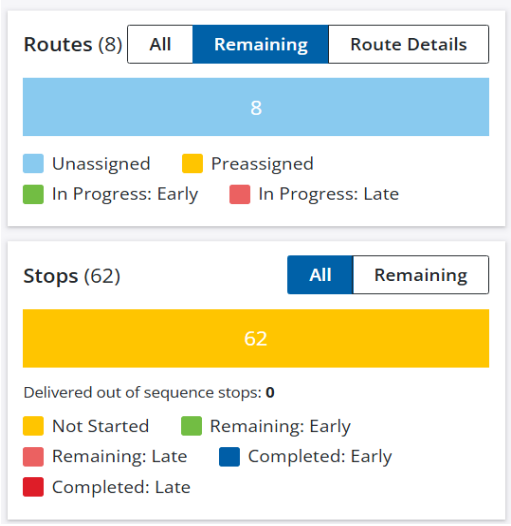

Figure 32 - Dashboard Routes and Stops chart

- Click on the *Route Details* tab to view Stop Status and times information on a Single Route (explained further below).
  - Click on the Stop Details button in each row of the table to open the Stop Details page in DRTrack.
  - View Routes that were completed out of the provided sequence (orange badge).

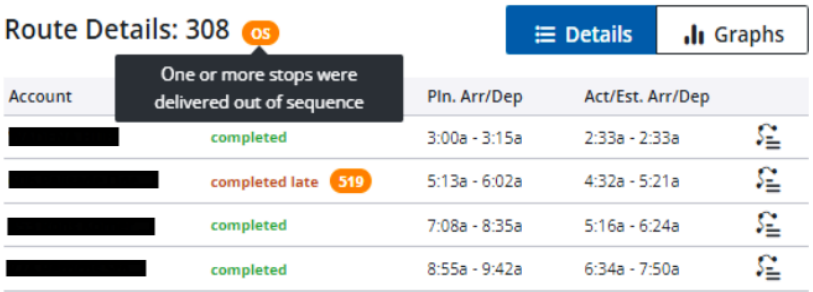

Figure 33 - Route Details Table with one Route completed late and out of sequence

Single Route View

Click a Device (blue outlined circle) to zoom in the map and display the Single Route in progress:

- The Route status is indicated by the color and shape inside of that circle:
  - Green circle — The Stop is on time or estimated to arrive early.
  - Red circle — The Stop is estimated to arrive late or it was delivered past the estimated timeframe.
  - Checkmark — The Stop is completed; a number indicates an incomplete Stop.
  - Blue outline — Indicates its a device and the percentage of the Route that is complete.
- Hover over a Stop to display information about it — time window and planned, estimated, and actual delivery times.

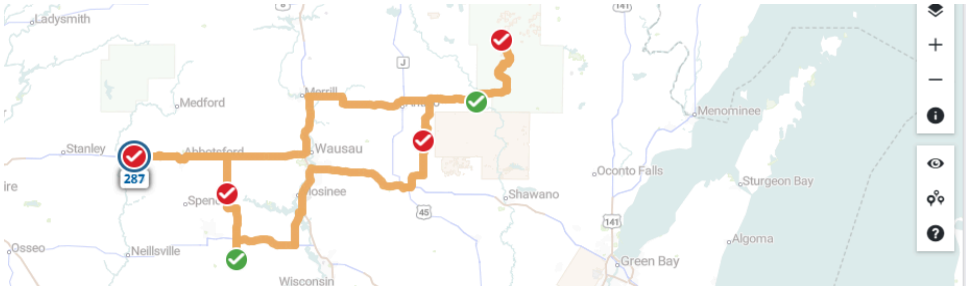

Figure 34 - Single Route view showing a completed Route

- Click on the Stop to display the *Edit Route* button and return to the Route Planning page, or zoom in to view completed / incomplete segments.
    - Completed segments are indicated by solid lines; incomplete segments have dashed.

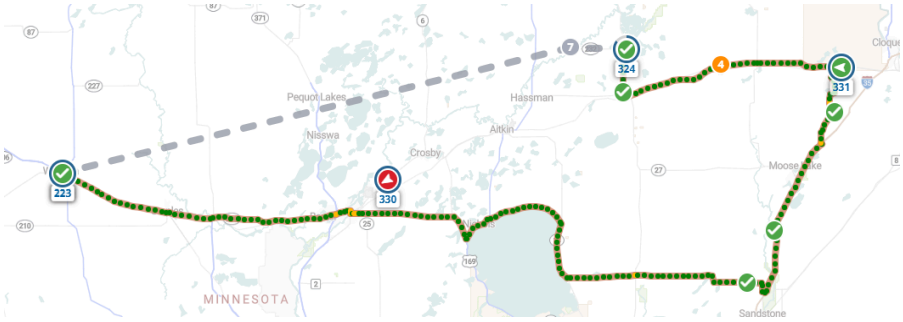

Figure 35 - Single Route Segment view

Footer

The Footer appears on most pages and provides a Branch summary for the selected Dispatch day(s). It is synced to Route planning actions. Anytime a Branch, Route, Stop, or Order are altered, it is reflected in the Footer for real-time statistics. It includes: Number of Routes, Stops, Orders, and unloaded Orders; Average number of Stops per Route; and a breakdown of miles, hours and cost.

Route Planning

The *Route Planning* page is ADP's primary resource for all things Route building. It houses multiple tools to build, optimize, and manage Routes. It is intended for one dispatcher per Branch per session. The page is composed of cards panels and lists to provide routing insights — Date picker, Route Cards, Stops Cards, Unloaded Orders Cards, Map panel, and Statistics panel. See the sections below for a deep dive into each component.

Route Planning Date Picker

- The date picker at the top of the application lets users select one or multiple dates for Route building. Set the default view in Business Rules —Start, End or Span— and change views at any time in the ADP toolbar.
  - **Start** — Shows only the Routes with the start date selected
  - **End** — Shows only the Routes that end with the date selected
  - **Span** — Shows all the Routes that fall between the selected start and end date.
- Business Rules allow the user to determine if they want the date range of the Routes to auto-adjust if the user takes an action that is outside of the initial date range selected.
  - **Toggle on** — Date picker auto-adjusts, and the span includes the new dates in the range.
  - **Toggle off** — Date picker does not change the date range. Displays changes in a Summary panel (top right).

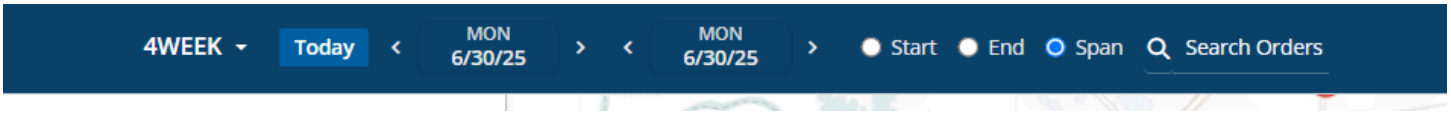

Figure 36 - Route planning date picker

Route Cards

The *Routes* list (left) is a fixed panel displaying a list of all the Routes built for the selected day(s) and Branch. The list contains a toolbar with icons for quick actions, a More Menu (three dots) for additional Route management and customizable Route cards.

By default, the Route card is displayed in sequential order and has a header row and Route-specific information.

- *Route* cards can be sorted, filtered, styled, locked, and pinned.
- Hover over the *Route* card to highlight that Route on the map.
- Click on the card to view specific information, optimize sequence and view Truck info, etc.
- If no Routes exist, click the *Create Route* icon on the Routes header, and use the *Route Building Wizard*.

Route Card Header

Route card headers display the following: 1.) Route Name 2.) Route Lock 3.) Finalized Route indicator 4.) Push pin for pinning Routes 5.) Toggle to hide the Routes on the map 6.) More Menu for additional actions.

Route-Specific Information

The following is by default, but you can add more Route-specific information to the cards using the Card Layout Editor.

- Route start date and time
- Number of stops, stop details, and a light bulb icon for Route Suggestions
- Default Volume field #1 (See Set Alias)
- Violations present on the Route, if applicable (See Prescriptive Intelligence)

Pin a Route

Pin a Route to populate the Stops card and isolate the Route(s) on the map. The Routes list allows users to pin up to three Routes at a time.

1. **Pin a single Route** — Complete one of the following actions:
   a. Click the push pin on any Route card.
   b. Click any white space on the Route card.
   c. Click on the Route card then click the checkbox on the Stop cards.
2. **Pin multiple Routes** — Click each Route's push pin, or use the multi-Route selecting tool.

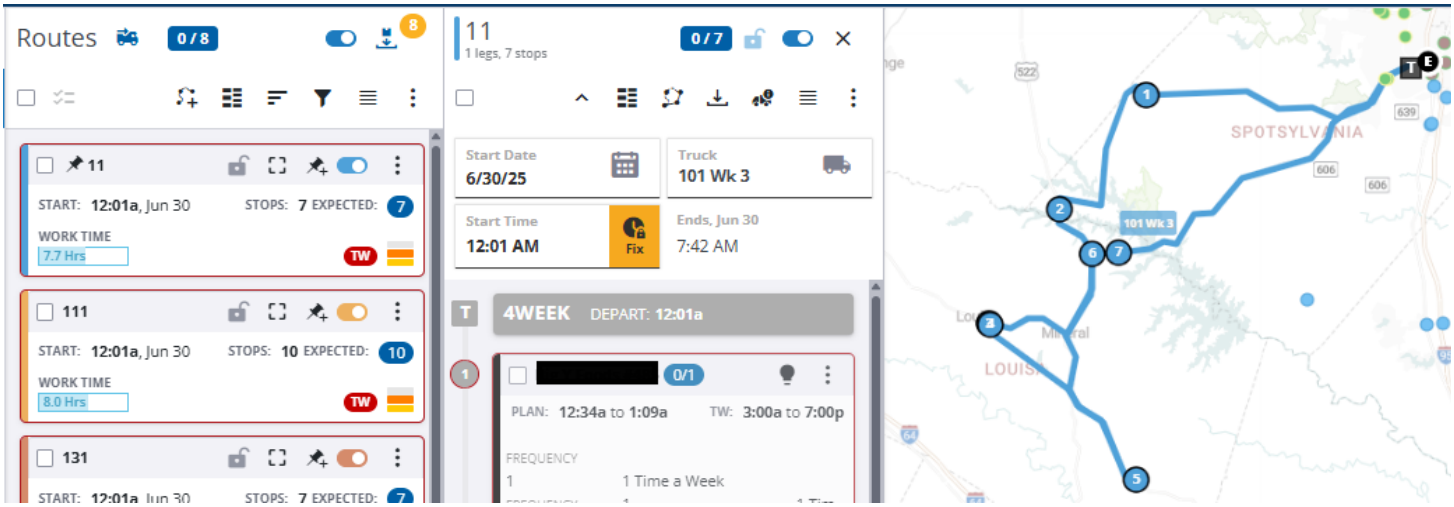

Figure 37 - Route 11 is pinned and isolated on the map

Unpin a Route

- **Unpin a Route** — Click the X at the top right of the *Route Stop* list to unpin the Route and hide that Route Stop list.
- **Unpin all Routes** — Click the Push Pin icon in the map controls menu (upper right on the map).

Lock a Route

Lock a Route to prevent unwanted changes when unloaded Orders are added or the Sequence is Optimized. See the Lock Routes section to learn how to lock multi Routes in a Branch, and use a fourth lock.

There are three different locks that you can apply to the Route using this option:

- **All Changes** — Prevents stops from being added or removed. Stops can only be re-sequenced.
- **Loading Orders** — Prevents new Stops from being added. Stops can be removed and / or re-sequenced.
- **Unloading Orders** — Prevents Stops from being removed. Stops may be added and / or re-sequenced.

1. Hover over a locked Route to see the type of lock(s) already applied (if applicable).

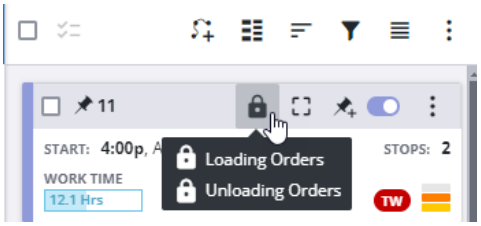

Figure 38 - Lock a Route button and lock options

2. Click on the *Lock* icon found in the Routes card toolbar.
3. Click on each lock you wish to apply - Available lock options are grayed-out. Locks in use are blue.
4. Double click the lock to remove it.

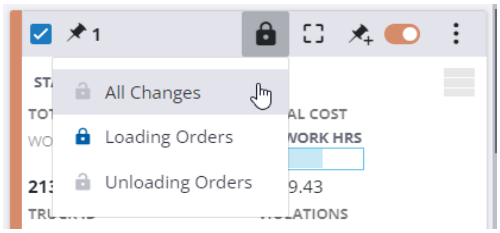

Figure 39 - Unlock a Route to allow changes

Route Planning Toolbar

Icons in the *Routes* Toolbar allow you to perform several Route planning actions: Multi-Select Routes tool, Route Building Wizard, Create Empty Route, Card Editor, Route Sorting, Route Filtering, Route On/ Off Map toggle, Unloaded Order count, and a More Menu for multi-Route actions.

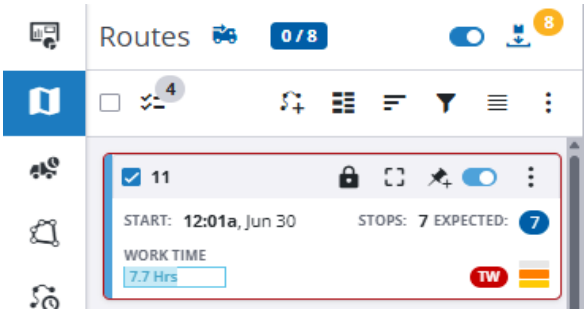

Figure 40 - Example Route card

Multi-Select Tool

The Routes toolbar allows users to select multiple Routes to complete the same tasks to each at one time.

1. Check the box next to the Route or Order card or line (in grid view).
   - The count on the icon at the top of the panel increases as cards are checked (see *Figure 40* above).
2. Click the *Only Show Selected Order* icon to isolate the selected Routes or Orders.

Build Route with Route Building Wizard

Build Routes with the Route Building Wizard.

Step 1 — Set Alias Preferences

Set the Alias preferences before planning Routes (most other default settings are sufficient to get started).

a. Navigate to the section named *Aliases* in the *Preferences* page.
b. Toggle on the settings you plan to use in your Orders — volume, quantity, Stop User, and Truck User Fields.
c. Use the dropdown to assign the defaults for each setting that was turned on (e.g., Stop User Field #2)
d. Move to Step 2 to start building Routes with the wizard.

Step 2 — Configure Route

a. Use the Route Building Wizard to configure a routing solution (collection of Routes) for a group of Orders in five steps. The steps that appear are dependent on the designation of Remote Redispatch Locations (RRL).
- If RRLs are created, a step for Remote Redispatch is added and the Boundary File step is disabled.
  - RRLs and Boundaries are not compatible. See the Tooltip for explanation.

Figure 41 - Route Building Wizard configuration steps without Remote Dispatch

Figure 42 - Route Building Wizard configuration steps with Remote Dispatch Locations

b. Open the *Route Planning* tab.
c. Click on the *Build Routes* button (truck) in the Route column.

Route Dates

Set the Orders dates for the build.

a. Specify the Earliest and Latest dates for the Orders selected.
- All the Orders available for the dates selected will be checked by default for Route building.

b. Use the time and date filter options to remove Orders from this list or change the time of the Orders.
- Sort Orders by any column, or add additional columns to find specific Orders or groups of Orders for editing.

c. Ensure the selected Orders for routing solution are correct.
d. Click *Next* to proceed, or *Close* to cancel your Route build.

Remote Redispatch

a. Select Remote Redispatch Locations and trucks. These points are inserted by the algorithm as needed.

- If a date and Branch has Routes that include Remote Redispatch points, those Routes cannot be targeted for loading additional orders, if you build multiple times.
- Locations and Trucks only appear in the wizard if they were identified in the Account and Truck profiles. See Remote Redispatching for details.

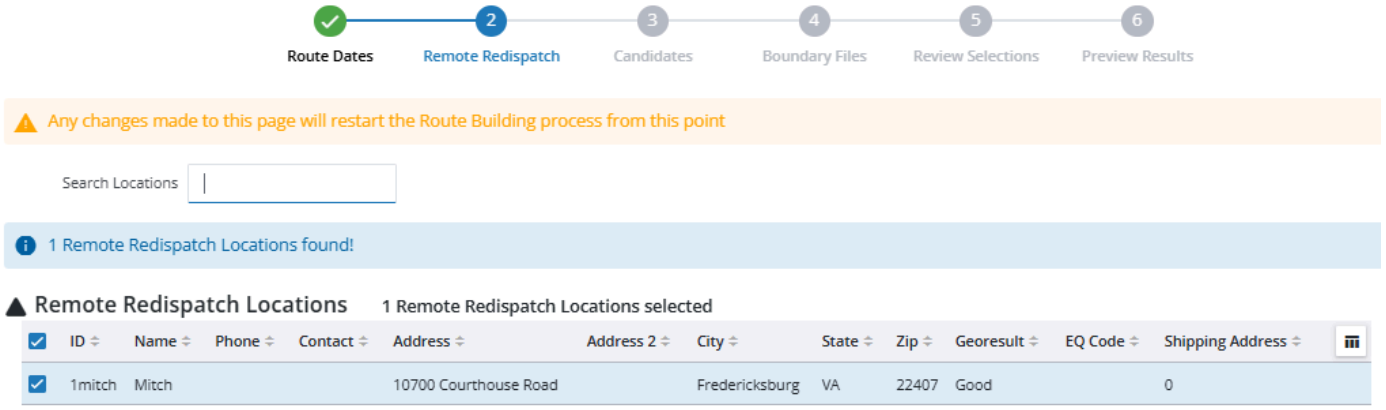

Figure 43 - Select Remote Redispatch Locations

b. Click on the Configuration button (top right grid) to add the *Redispatch* column for easy identification.

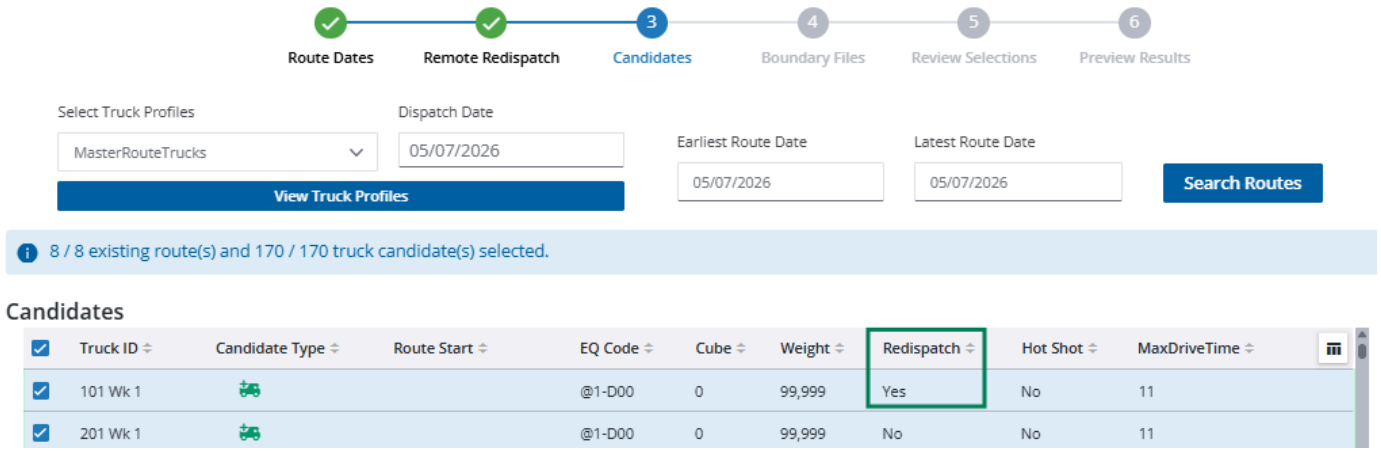

Figure 44 - Select Trucks for Redispatch

Candidates

a. Select the Truck profile to be used for the routing solution.

- Click on *View Truck Profiles* to see all Profiles for a specific Master Truck Record.

b. Adjust the *Earliest* and *Latest Route Dates* for the Profile.

c. Select the Candidates (Trucks) you wish to add to the routing solution.

- **Red** — Candidate is already in a built Route. Check Route dates.

- **Yellow** — Candidate can be used if the Reuse Candidate setting is enabled (See Behaviors Settings).
- **Green** — Candidate is available. This is an empty truck.
- **Fixed Route** — Candidates cannot be unselected to ensure the FixedRT fields are considered.

d. Click *Next* to proceed.

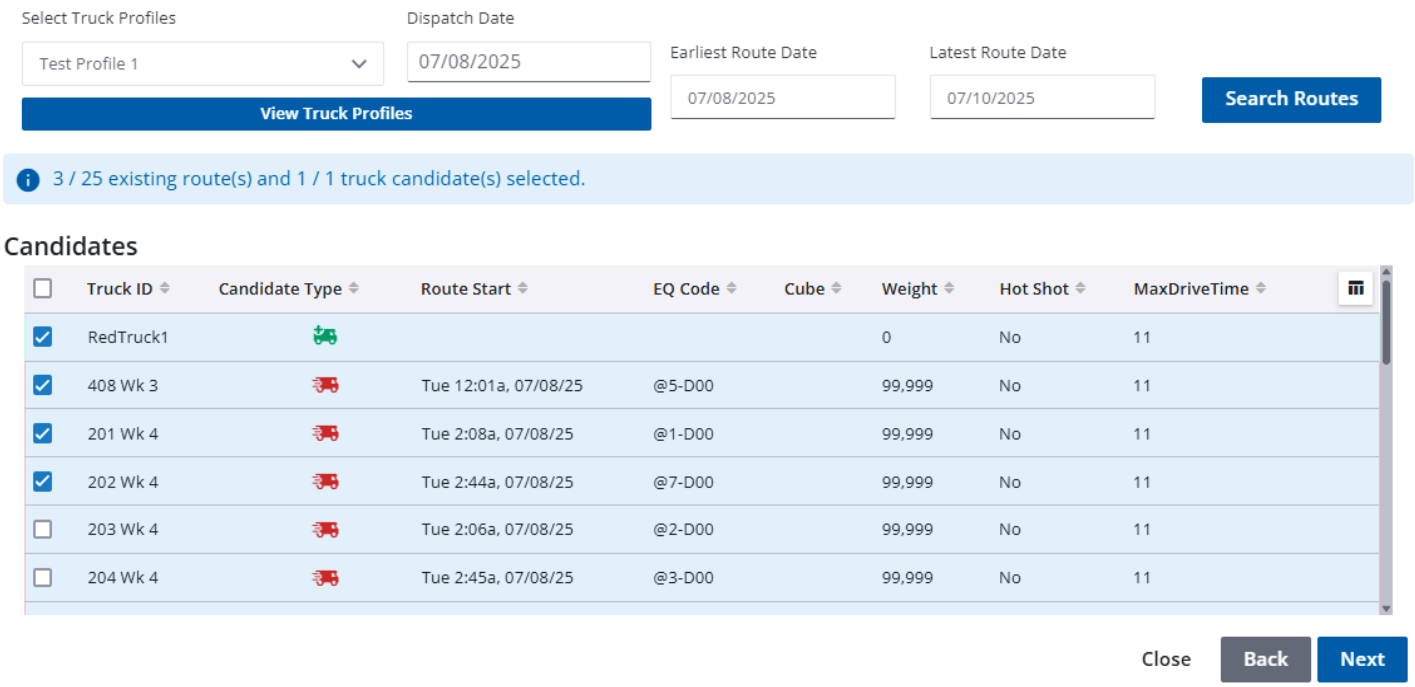

Figure 45 - Select Candidates window

Boundary Files

a. Determine if the Routing solution should include a Boundary file.

- For more information on Boundaries and Boundary Files, click here.

If your organization is	Then
NOT using a boundary file (fully dynamic routing)	Choose *Build Routes with No Boundary file*
Using an existing Boundary File	Click on *Choose Existing Boundary File* then select the desired file.
Using a new Boundary File	**1.** Create a Boundary file. **2.** Select *Upload New Boundary File*. **3.** Click on *Choose file to Upload* or drag the file into the box. **4.** Select the desired Boundary File to include in the routing solution.
Using Remote Redispatch Locations	Boundaries are not compatible and this step is disabled

b. Click on *Next*.

Review Selections

The preview pane summarizes the previous selections before starting the automated Route-building solution.

a. Confirm all selections are correct. If you need to edit a selection, return to the previous steps to modify.

- Click on the white boxes under *Candidates* and *Remote Redispatch* for details

b. Determine if you want to optimize the Route, if yes, check the box to *Optimize Routes after loading*.

c. Click on *Preview* to review the Routes first, or select *Build Routes* without reviewing.

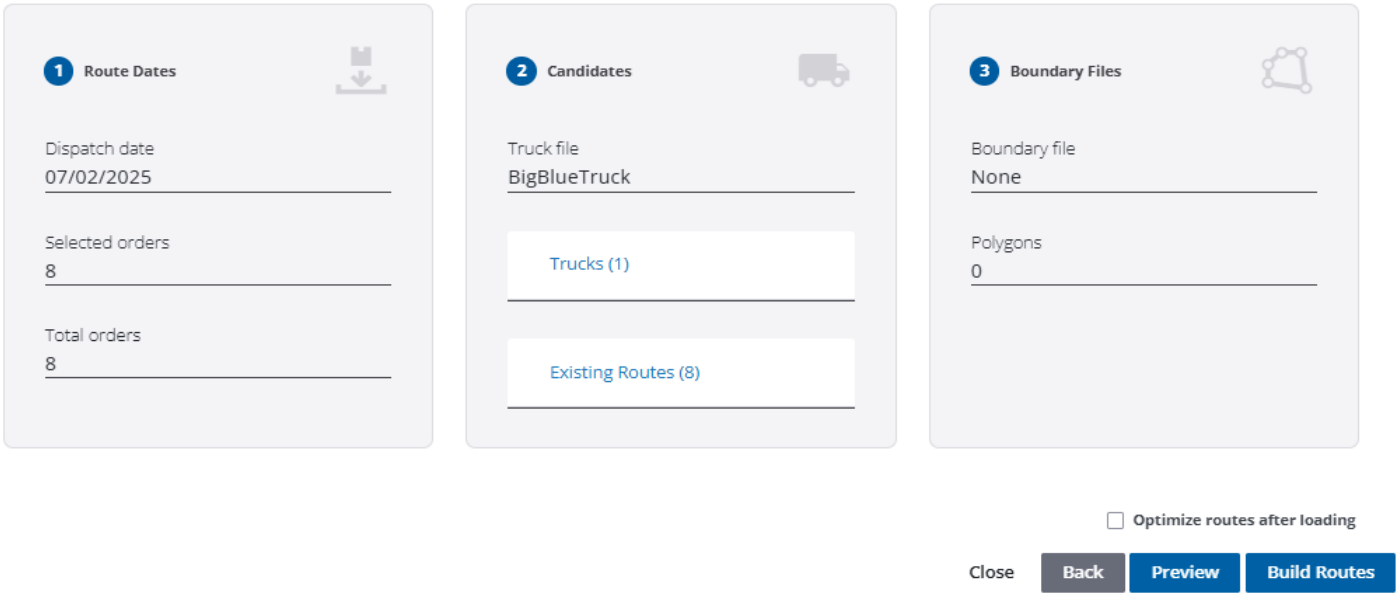

Figure 46 - Review Route Selections window with Boundaries

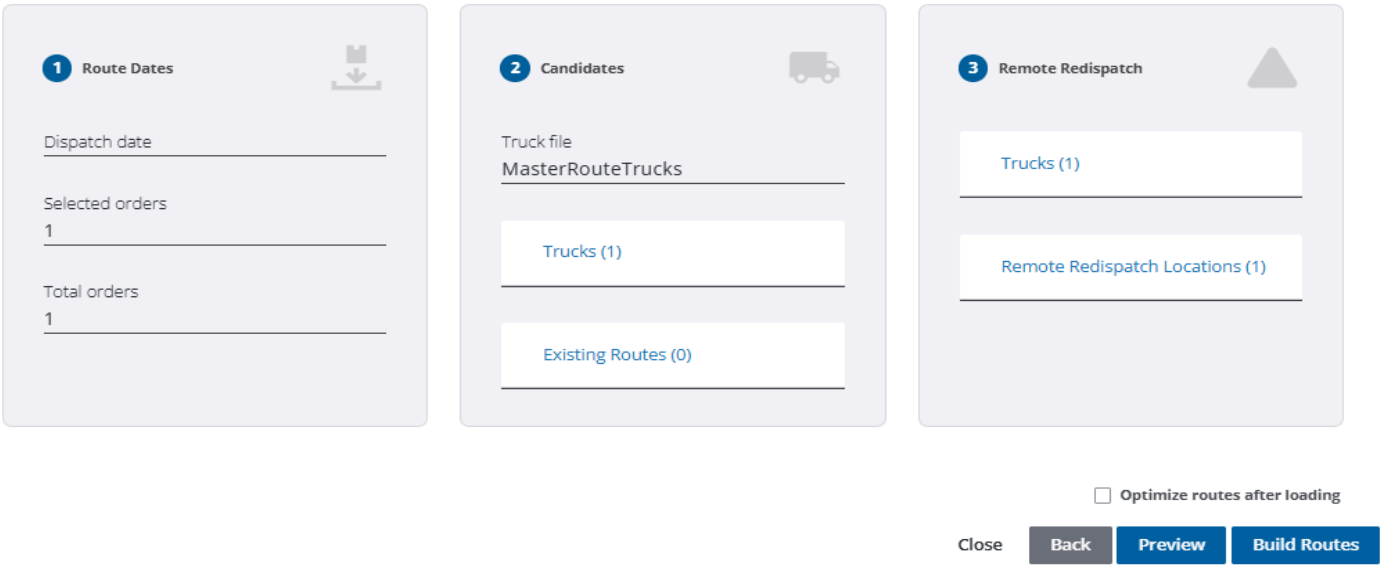

Figure 47 - Review Route Selections window with RRLs

Preview Results

This step itemizes the Routes created and the Routes and Orders impacted because of the new build. Users can go back to adjust selections or click on *Build Routes* to continue.

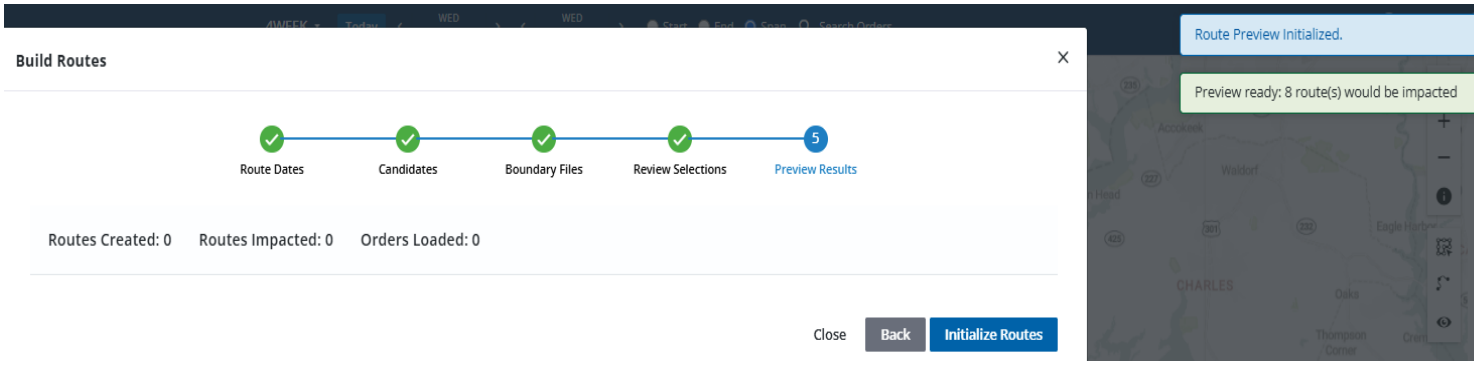

Figure 48 - Preview Route before finalizing

When the Route Building Wizard is done:

- The *Route Planning* tab lists the fewest number of Routes possible for the Trucks, boundaries, and Orders selected.
- The Route cards are stacked in the *Routes* column.
- The map shows all the Routes plotted in color-coded lines and stops.
- The Statistics panel (bottom of page) shows the Route comparison statistics.

Create Empty Route

Create an empty Route for anticipated orders to ensure Drivers and Trucks are accounted for in the planning.

1. Click on the *Create Empty Route* icon to build the Route.
2. Select the Truck Profile and ID you want to create a Route for.
3. Review any violations and fix, if necessary.
4. Click on *Continue* to create the empty Route or *Cancel* to select a different Truck Profile/ ID.

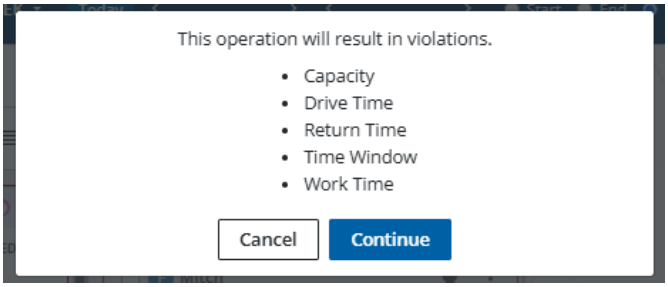

Figure 49 - Violations warning message during Route creation

5. Hover over the **#** in the Route header to view its *Configurations* and *Avoids and Favors*.
   - Enable or Disable these settings as needed.

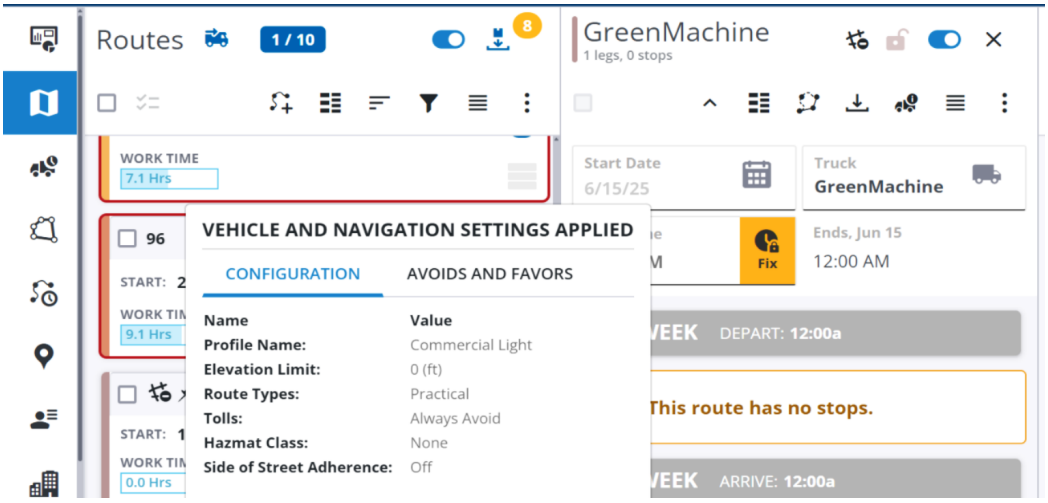

Figure 50 - Vehicle and Navigation Settings applied to the empty Route

6. Adjust the Truck Profile or ID, Start Date, Start Time, and set the time to Fixed or Floating from the Stop column.
   - If the Truck Profile/ ID is changed, it prompts users (top right corner) to also change the Route name to prevent multiple Routes with the same name (See Reuse Truck settings for more information).
   - If the Start Date is adjusted beyond the dates selected in the Branch date picker in the header, the Route may fall out of view based on the settings enabled (See the explanation here).

Route Card Layout Editor

Click on the Layout icon and choose your desired Style and Layout. Easily switch between them.

- Choose between three different styles with customizable Layouts — *Details*, *Compact*, *None.*
- Copy and modify any saved layout, or build a new one from scratch.

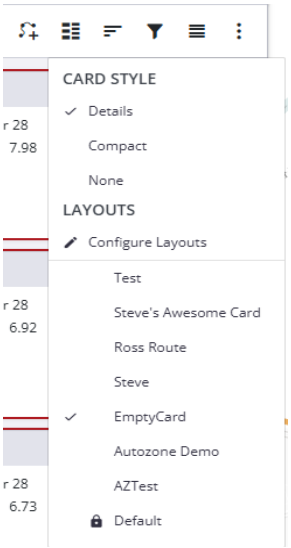

Figure 51 - Card Layout Editing options

Create a New Layout

Users can easily create a new layout or copy from an existing template.

1. Click on the Layout Editor icon.
2. Click on *Configure Layouts*, and select *New Layout*.
3. Determine if you want to copy and modify an existing layout or create a brand new layout.
   - Copy — Select an existing template from the drop down menu at the bottom of the screen.
   - New — Leave the template selection set to Blank.
4. Enter the name of your new layout template.
5. Click the green checkbox to confirm.

Figure 52 - Create new template using an existing Test template

6. Drag and drop the fields onto the card to customize the view.
   a. Click on the green plus sign to add a new row.
   b. Select the information from the left navigation panel and drag it over to the new row.
   c. Hover over the row to display a grid and select the location for the new information.
   d. Format font style and size, or edit text labels (where applicable).

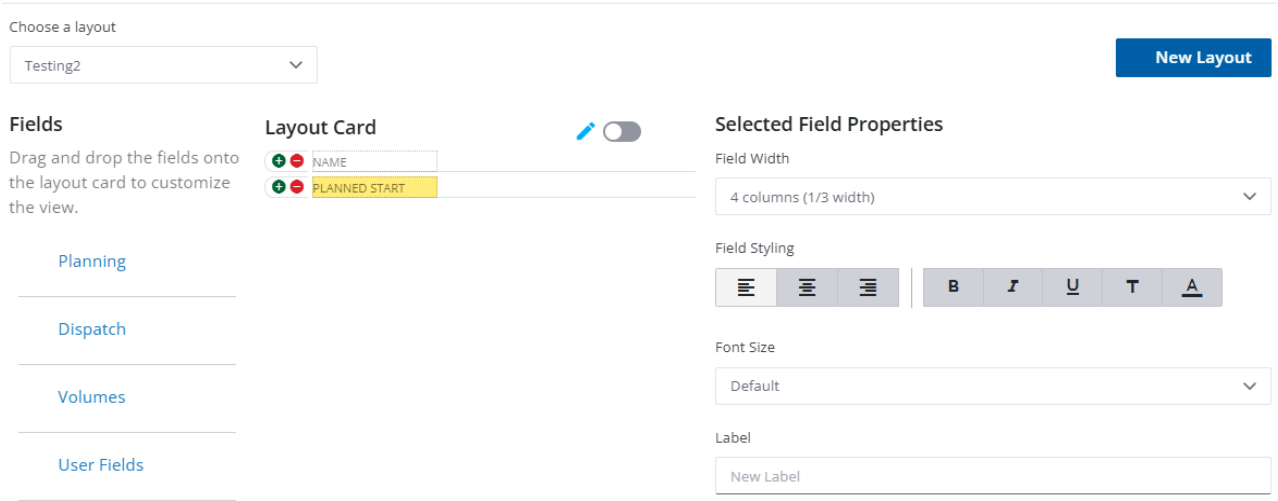

Figure 53 - Drop and drag fields into the new Layout Card

7. Click *Save* to use the template on a case by case basis, or click *Save as Default*.
   - The new layout template will appear as the default when you click on the Layout Editor Icon.

Switch Between Layouts

1. Click on the Layout Editor icon and select *Configure Layouts*.
2. Select the template you wish to use from the drop down menu at the top.
3. Click on *Apply* at the bottom of the screen.

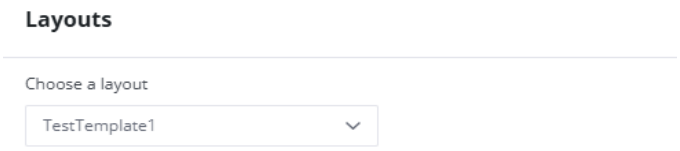

Figure 54 - Card Layout options in the drop down menu

Sort Routes

Sort Route card lists based on several attributes:

- Route Name
- Planned Start Time
- Planned End Time
- Rt Number
- Dispatch Date
- Route Modified Date
- Route Finalized Date
- Load Date
- Total Stops
- Total Cost
- Total Distance
- Work Time
- Total Legs
- EQ Code (equipment)
- Violations
- Completed Status
- Dispatch Fields
- Volume Fields
- User Fields

1. Select the sort icon to display the list of sortable attributes.
2. Double click the attribute to change the sort direction from ascending to descending order.

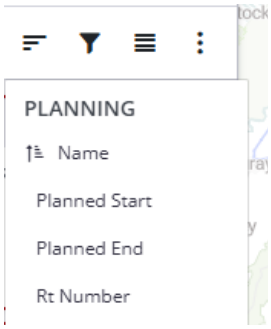

Figure 55 - Route sorting options

Filter Routes

A robust filtering tool allows users to create expression-based filters. You can filter either manually or automatically using system- applied rules. Only the filtered Routes appear on the map until the filters are reset.

Manual Filter

1. Select the filter icon to display a list of all of the Routes for that dispatch date.
2. Select / deselect Routes using the blue toggles to the left of each Route (see *Figure 56* below).
3. Click *Done* when you are finished filtering, or Reset to clear filters (see *Figure 57* below).

Automatic Filter

Use this advanced option when there is **more than one attribute that you want to filter** by (e.g. load date AND total stops, assigned Driver AND planned start time). E.g., you **only want to see Routes that are greater than 150 miles**:

1. Click on the *Filter* Icon.
2. Use the drop down menus to select *Total Distance* AND *Greater Than.*
3. Enter 150, and click the *Add* button.
4. View what filters have been added and how it impacts the list totals at the bottom of the window.
5. Click *Done* when you are finished filtering, or Select *Reset* to clear filters (see *Figure 57* below).

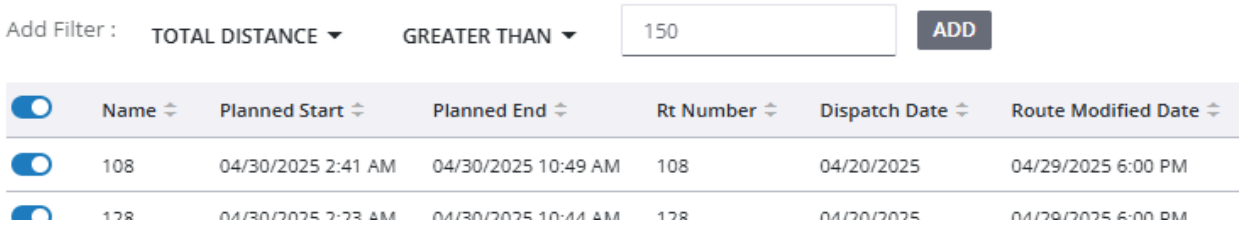

Figure 56 - Advanced filtering example

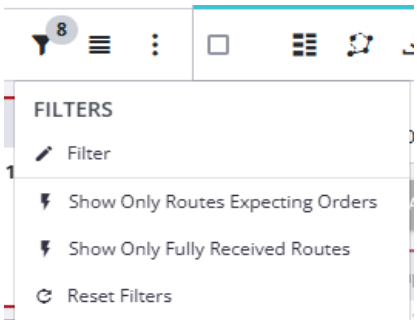

Figure 57 - Fast filters and Reset option

Routes Grid

Click on the four lines to toggle between cards and the data grid. The grid is a non-resizable two-pane window with all of the same functionality as the cards.

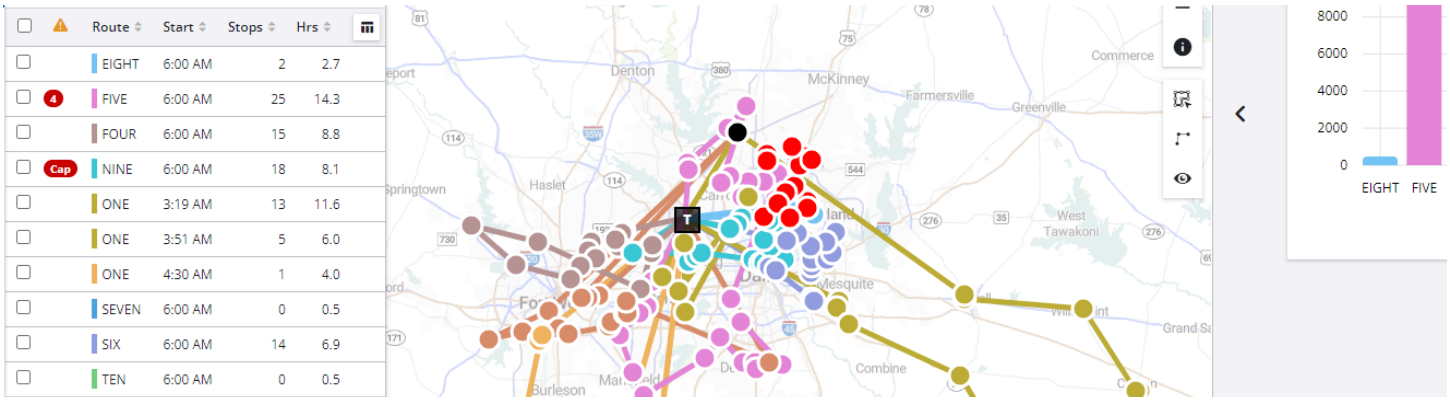

Figure 58 - Route grid view

- Click on the Configuration button (scroll to right) to select columns and a number of fields or volumes (see *Figure 59* below). Configured data is retained between sessions.
  - Scroll left and right to view all of the columns. They do not resize based on the number of columns selected.
  - Drag the headers left or right to rearrange the order of columns (this is saved between sessions).
  - Click on a column header to sort the data in ascending or descending order.
  - Sort the entire grid using the icon at the top of the panel.

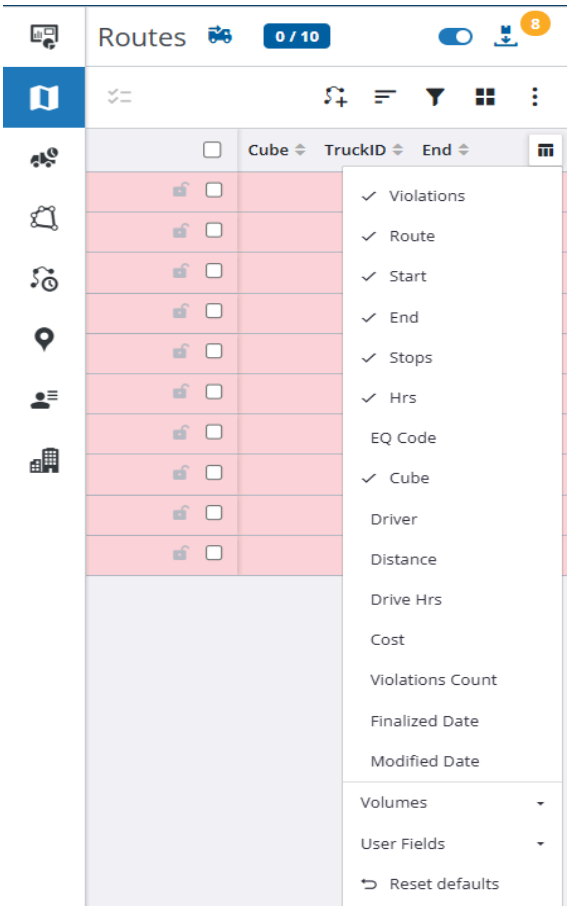

Figure 59 - Route grid configuration

Routes On / Off Map

Focus on Route details without the distraction of segment lines on the map.

Toggle the blue On / Off button in the top right to hide or show on the map. When the toggle is blue, the Route lines are shown on the map.

Unloaded Orders Count

Learn if there are any unloaded Orders and how many with this quick count feature (see *Figure 60* below).

- *Toggle Unloaded Orders* by clicking the blue box with the M download symbol.
- See the Load an Unloaded Order section for more information.

More Menu

There are two sets of More Menus (three dots) to allow for Multi-selected Route actions or Individual Route actions.

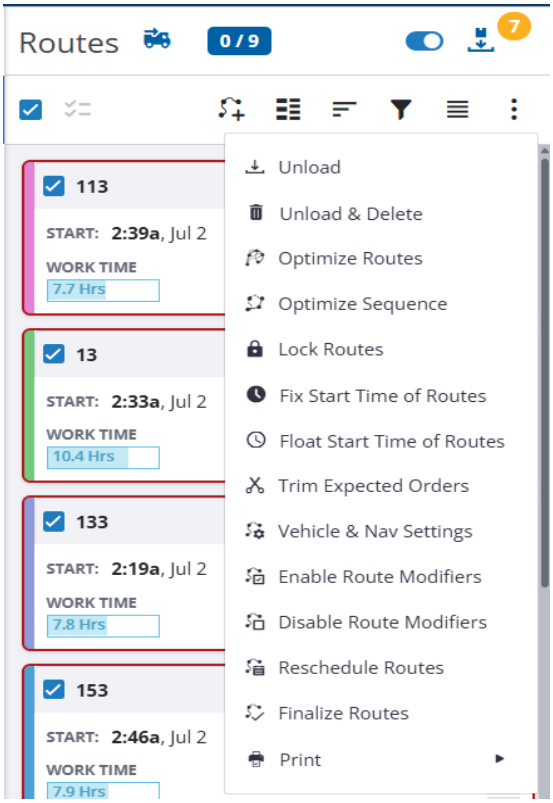

Figure 60 - Multi-Route level More Menu

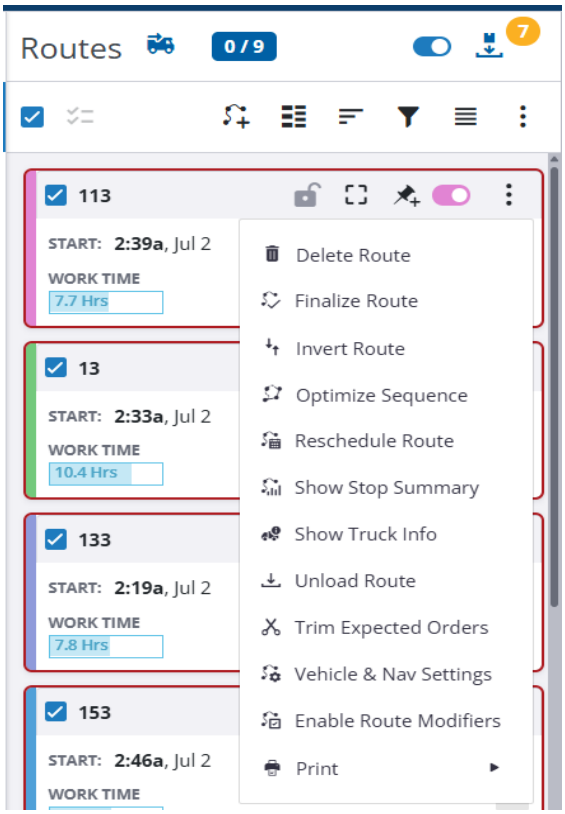

Figure 61 - Individual Route level More Menu

Multi-selected Route Actions

The following actions impact all the selected Routes.

1. Check the boxes on all the Routes you want to perform the action on.
2. Click the More Menu in the *Routes List* Column (not the Individual card).
3. Select the action you want to complete from the menu and complete the steps in the sections below.

- Unload
- Unload & Delete
- Optimize Routes
- Optimize Sequence
- Lock Routes
- Fix Start Time of Routes
- Float Start Time of Routes
- Trim Expected Orders
- Vehicle & Nav Settings
- Enable Route Modifiers
- Disable Route Modifiers
- Reschedule Routes
- Finalize Routes
- Print

Unload (multi-route)

Use this tool to remove the Orders from **the selected Routes**, but keep the empty Routes as a placeholder.

- Unloaded Orders move back to the unloaded Order pool for re-planning. To learn how to Load the Orders onto a Route, see the Load an Unloaded Order section.

1. Select *Unload* from the More Menu Action list.
2. Dynamic Route — Click on *Yes* to confirm, or *No* to cancel.

   Fixed Route — Type Unload in the box when prompted to start the unload, or *No* to cancel.

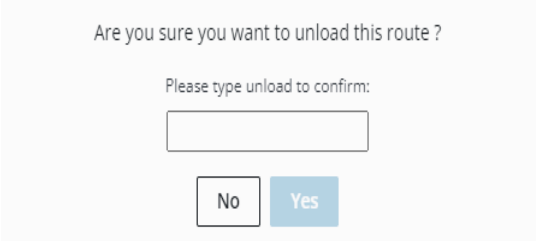

Figure 62 - Unload a Fixed Route confirmation request

Unload & Delete (multi-route)

This feature removes Orders from **the selected Routes**, and deletes the Routes in one step.

- Unloaded Orders move back to the unloaded Order pool to be picked up by another Route. To learn how to Load the Orders onto a Route, see the Load an Unloaded Order section.

1. Select *Unload & Delete* from the More Menu Action list.
2. Click on *Yes* to confirm, or *No* to cancel.

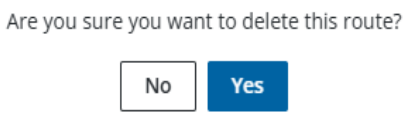

Figure 63 - Unload & Delete Route Confirmation Window

Optimize Routes (multi-route)

The Optimize Routes tool uses an Appian proprietary algorithm to optimize **the selected Routes** in the Branch, meeting all of the criteria selected in the *Preference* algorithm settings. Restrictions apply for Routes with Remote Redispatch Locations.

1. Review the Locks applied to the Routes, and make necessary adjustments (See Lock Routes for details).
2. Select *Optimize Routes* from the More Menu Action list.
3. Click on *Preview* to see the optimized changes, click on *Optimize* to complete without a preview, or *Cancel* to exit.
4. Review the changes in the Preview and determine if you want to move forward with the optimization.
   - The summary reflects the Routes modified and the stops moved along with the mile, cost, and hour adjustments made in the Route Optimization process.
5. Click on *Apply Optimization* to proceed, or cancel to exit.

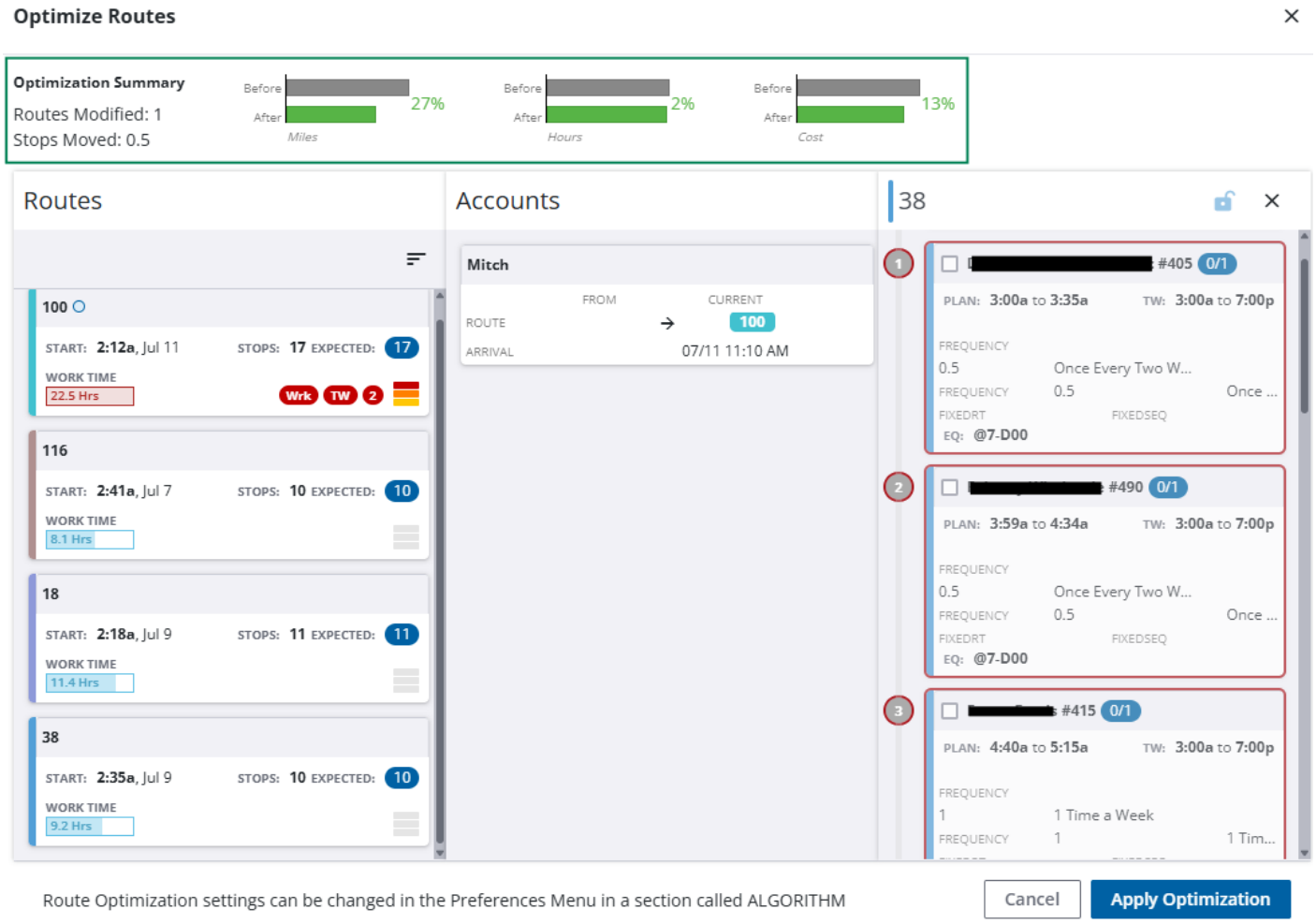

Figure 64 - multi-Route Optimization Preview window

Optimize Sequence (multi-route)

The Optimize Sequence feature uses an Appian proprietary algorithm to place **Stops on a Route in the best sequence**, meeting all of the Preference criteria selected in Algorithm settings. To Optimize Sequences for Individual Routes or using Stops Lists, view the instructions in their appropriate sections. Restrictions apply for Routes with Remote Redispatch Locations.

You can optimize the sequence of multiple Routes two different ways:

- Control+Alt+O — Optimizes the sequence of **all Routes** at the same time without locks or previews.
- Multi-Select — Optimizes the sequence of **all the selected Routes** at once, and offers an optimization preview.

Caution: Optimize Sequence will not add or remove Remote Redispatch Stops and does not treat Remote Redispatch Stops as candidates

Control+Alt+ O

Use the Control+Alt+O option to initiate a fast optimization of all Routes without options to lock or sequence previews.

- You cannot omit any Routes from this optimization process. All Routes are optimized to the fullest extent.

Multi-Select Route Tool

Moves Stop(s) into a sequence that is most efficient for every selected Route, but it does not move Stops from one Route to another.

1. Click *Optimize Sequence* from the More Menu Action list.
2. Determine if any Route needs locked before optimization to reduce disruption in the Route.
   a. Determine which Routes you want to lock.
   b. Drag those Route(s) from the *Route* card list (left) to the lock type columns (right). Add the Route to each lock type you want to apply. There are four lock types to choose from:
      - **All Changes** — Prevents stops from being added or removed. Stops can only be re-sequenced.
      - **Loading Orders** — Prevents new Stops from being added.
      - **Unloading Orders** — Prevents Stops from being removed.
   c. Click the Redo icon at the top of each column to empty that specific column and start over, or click the redo icon in the Locked Routes section to empty all columns.

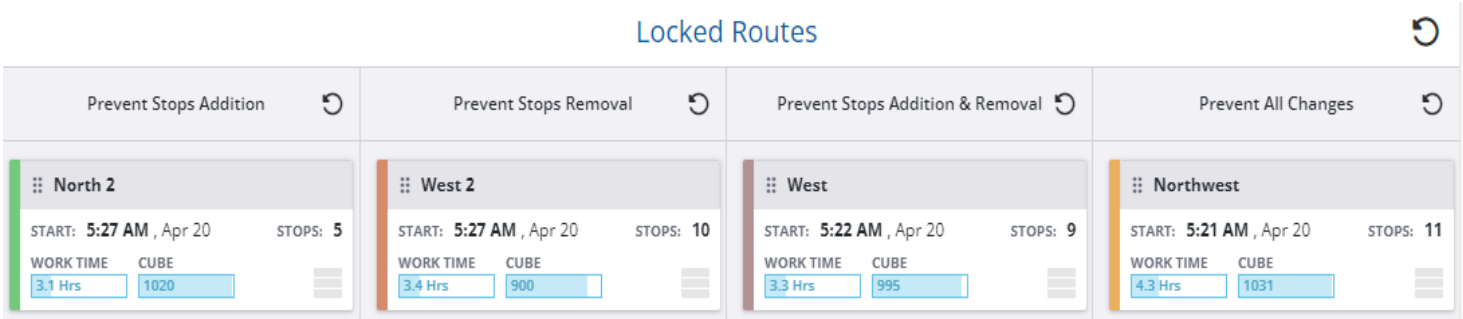

Figure 65 - Example of locked Routes and lock types

3. Preview the Routes' optimization options (See *Figure 66* below).
   - The left column shows the Routes selected for optimization, and the impact for each.
   - The columns to the right show the original Stops sequence and the optimized Stops sequence.
   - An Optimization summary (top) indicates the Mileage, Hours, and Cost savings of the new sequence.
   - If a Route is already in an optimal sequence, it displays a *No Savings Found* message.
   - If the Route has violations, it displays *Could not optimize due to violations* (See Prescriptive Intelligence).
   - If you do not wish to use the optimization suggestion, click *Cancel* at the bottom of the screen.
4. Click the box of each Route you want optimized. Verify changes. Undoing optimization is not an easy task.
5. Click *Optimize* at the bottom to save all of the new Stops sequences. Partial changes cannot be saved.

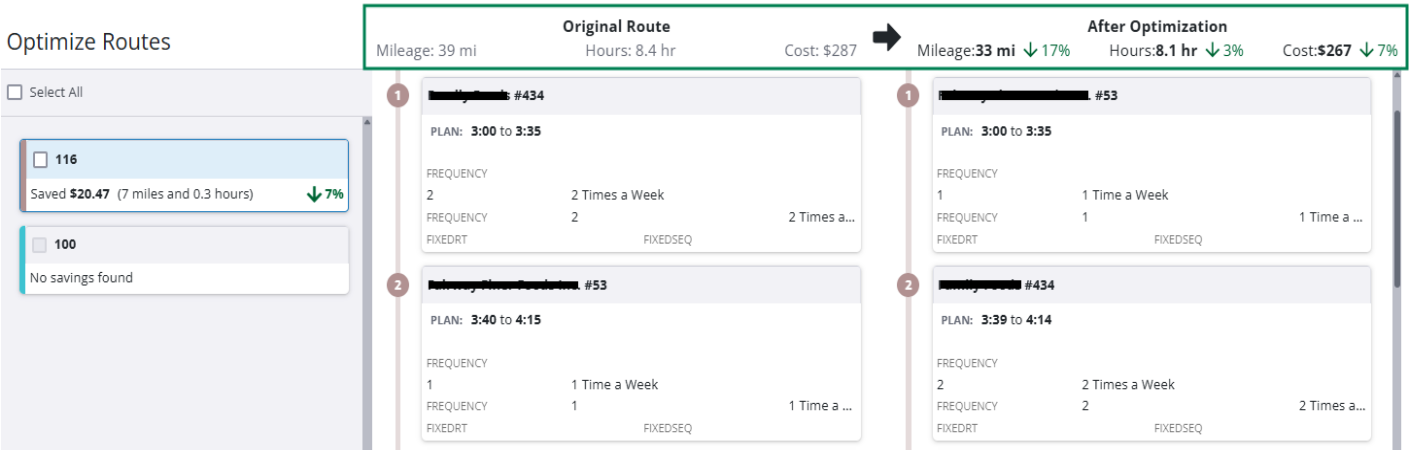

Figure 66 - Example of an Optimized Sequence preview and summary

Lock Routes (multi-route)

Lock all Routes in the Branch to prevent unwanted changes when unloaded Orders are added or Sequence is Optimized. There are four different locks that you can apply to the Routes.

- **All Changes** — Prevents stops from being added or removed or re-sequenced.
- **Loading Orders** — Prevents new Stops from being added. Stops can be removed and / or re-sequenced.
- **Unloading Orders** — Prevents Stops from being removed. Stops may be added and / or re-sequenced.
- **Loading / Unloading** — Prevents Stops from being added or removed. Stops can only be re-sequenced.

1. Drag the Route to the appropriate column.
2. Click the X at the top of the window to return to the Routes page.

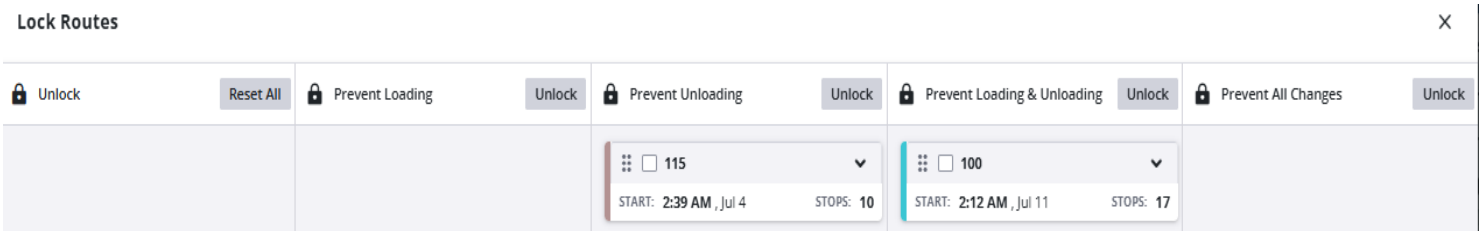

Figure 67 - Example of locked Routes and their lock types

Delete all Locks — Click on the Reset All button to unlock all Routes and return cards to the left Unlocked column.

Delete a Lock category — Click on the Unlock button to clear all the Route locks in that category.

Modify a Locked Route — If you attempt to change a Locked Route, an alert will appear.

1. Click *Cancel* to avoid the changes or *Proceed* to continue.
    - Proceeding overrides the lock and completes the action, but does not remove the lock.

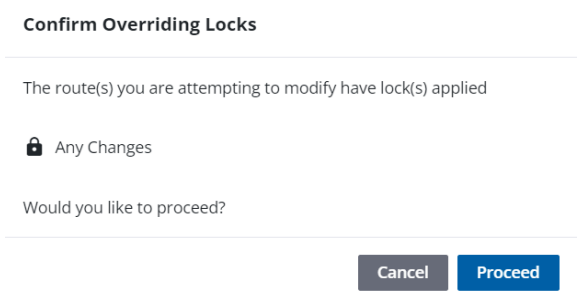

Figure 68 - Lock Overriding confirmation request

Fix Start Time of Routes (multi-route)

Lock the start time of **multiple Routes** to prevent adjustments when an Order is added or the Routes are optimized.

Select *Fix Start Time of Route*s from the More Menu Action list.

- To reverse this setting and allow start time adjustments for all Routes, toggle the Routes to a Float Start Time.
- To adjust just one Route, click on the Route card to populate the Stop cards and click on the clock at the top.
- If the Routes have a Fixed Start Time, the Start Time icon is blue.

Float Start Time of Routes (multi-route)

Float the start time of **all the Routes** to allow adjustments when an Order is added or the Route is optimized.

Select *Float Start Time of Routes* from the More Menu Action list.

- To reverse this setting and fix start times for all Routes, toggle the Routes to Fix Start Time of Routes.
- To adjust just one Route, click on the Route card to populate the Stop cards and click on the clock at the top.
- If the Routes have a floating start time, the Start Time icon is yellow

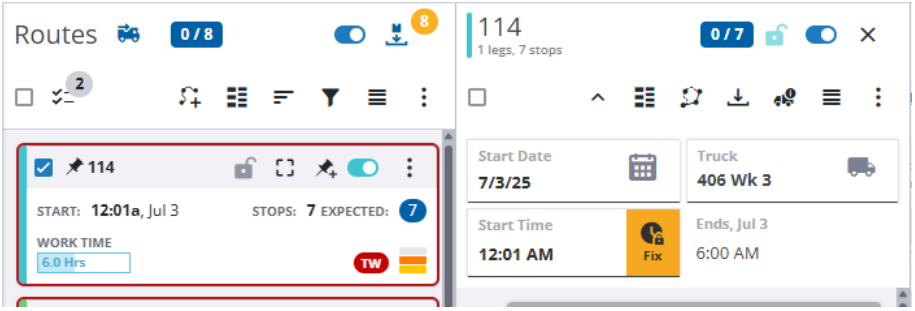

Figure 69 - Example of Routes with Fixed start times

Trim Expected Orders (multi-route)

Trim Routes with Expected Orders that have been delayed to avoid unnecessary Stops.

1. Ensure the DRT INI FixedRoutesAction is properly set.
   - **WithOrders** — Manual Orders created in DRT show up as Expected in the Daily Planner.
   - **WithoutOrders** — Manual Orders created in DRT **DO NOT** show up as Expected in the Daily Planner.
2. Select the Routes you want to trim from the *Routes* page, or use the *Show Only Routes Expecting Orders* quick filter.
3. Scroll down to *Trim Expected Orders* from the More Menu Action list.
4. Ensure you want to trim the Routes, and click on the Trim button to proceed. **This action cannot be undone.**

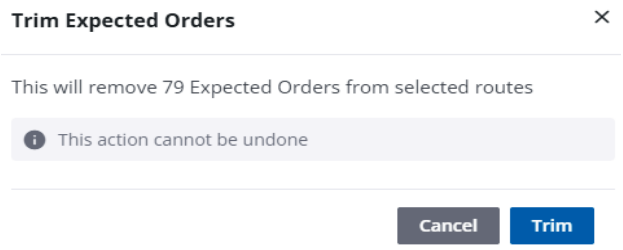

Figure 70 - Trim Expected Orders confirmation window

Vehicle & Nav Settings (multi-route)

Apply a variety of settings to customize and enhance multiple Routes in the Branch at one time (e.g., routing based on loads and road preferences). Any option selected in this window overrides the Default settings made in Preferences.

- This action is only visible with an active PC*Miler Web Services (PCMWS) license.
- Vehicle & Nav Settings remain regardless of any action taken to modify the Routes.
- Routes with settings applied should cache the options selected.

Available Configurations

- **Configuration Tab** —Vehicle and Navigation settings (e.g., avoid tolls, fastest vs shortest Route).
  - **Vehicle Profile** — The backup profile used if an invalid profile is detected while applying vehicle settings.
    - Vehicle type, dimensions, and load influences how Routes are calculated while being legally compliant.
    - Configure in the Account Manager. For more information, click here.
  - **Elevation limit** — (N. America only) Sets the elevation limit for the Asset type and load. Default value is null.
    - The entered limit is ignored if it is deemed impractical, or a Stop is located at an elevation higher than the entered limit.
  - **Max Speed** — (N. America only) Sets max speed, in mph or kph, determined by the DistanceUnits parameter.
  - **Apply Traffic Data** — This allows the algorithm to use traffic data and historical traffic patterns and avoid traffic closures while calculating the trip's ETA and travel time.
    - The trip's departure time is set within 15 mins of the current time
    - Real-time traffic data is used for the first 15 miles and historical traffic patterns are used for the remainder.

    - Feature is only used when the *Route Type* is set to *Fastest* with the exception of road closures.
  - **Highway Only** — Enables highway-only routing to generate distances between cities or postal codes.
  - **Use Sites** — (Also known as *Places*) Indicates if the Stops are off site and considers site gates during routing. For a full list of available sites/ places, visit Content Tools.
  - **Route Type** — Calculates your trip based on preference. For additional information, click here.
    - **Practical** — Uses a typical Route. Takes the most direct path and stays on major, high-quality highways to minimize time and cost.
    - **Shortest** — Uses the shortest Route within reason. May be longer than the practical route based on road conditions, speed limits, and other factors.
    - **Fastest** — (N. America only) Uses the fastest Route based on real-time and historical data. Mileage may be more than the practical Route. Not recommended for trucks. Only be used for vans and automobiles.
  - **Tolls** — Pick between Always Avoid or Try to Avoid tolls. This could impact distance, ETAs, etc…
  - **Hazardous Material Class** — For hazardous material types and categories, click here.
  - **Side of Street Adherence** — Use this setting to avoid the destination being on the opposite side of the street.
    - The **Off** setting will not reroute based on the side of the street, while **Strongly Adhere** uses any means necessary to reach the destination on the same side of the street.

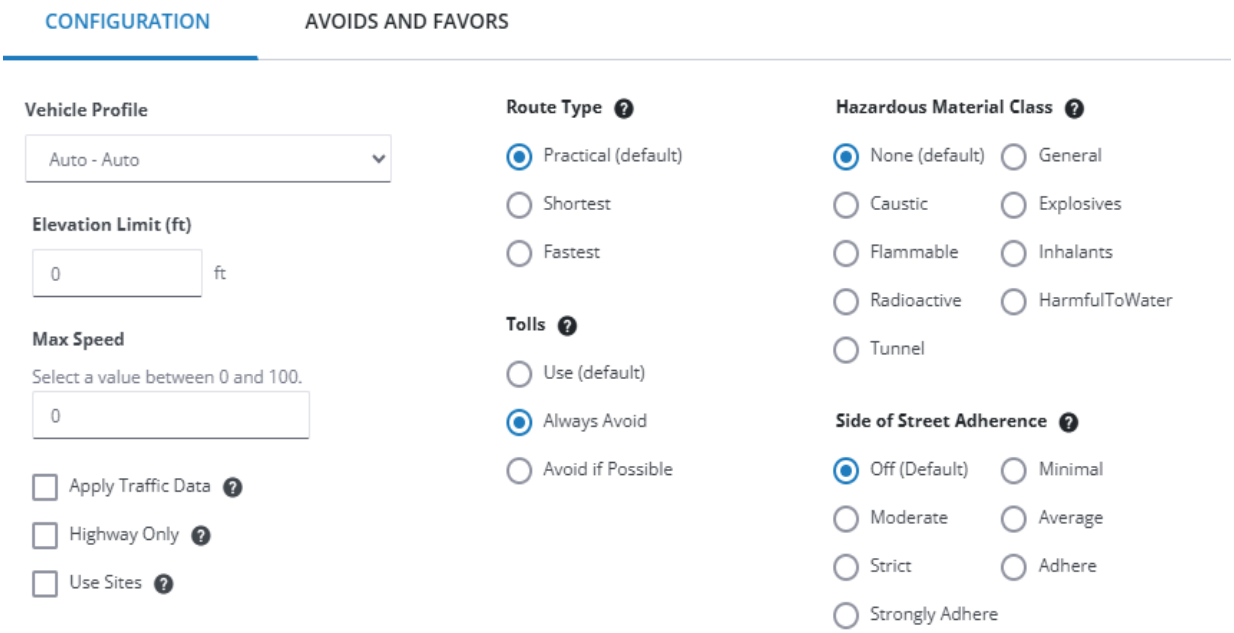

Figure 71 - Vehicle and Navigation Settings window

- **Avoids and Favors Tab** — Avoid unfavorables in a Route for a more viable path. E.g. avoid construction or streets with noise ordinances.
  - Manage Avoids and Favors in Content Tools, and select which ones to apply from the Avoids and Favors tab.
  - A confirmation message appears in the top right corner of the screen when rules have been applied.

Enable / Disable Route Modifiers (multi-route)

Click on *Enable* or *Disable Route Modifiers* to quickly use/ not use the established Vehicle and Navigation settings on multiple Routes. This action overrides the default settings made in Preferences.

Reschedule Routes (multi-route)

Automatically reschedule selected Routes to accommodate changes to Stops, added Orders, or other variables like a change in Drivers. Select *Reschedule Routes* from the More Menu Action list.

Finalize Routes (multi-route)

Finalized Routes are ready to be integrated into the ERP or TMS system. This functionality allows you to focus on the completed Routes while avoiding the ones still in planning.

1. Click on *Finalize Routes* from the More Menu Action list.
2. Confirm the Routes were finalized with the checkmark next to the Route planning icon.

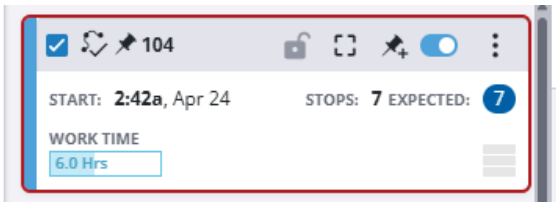

Figure 72 - Finalized Route with checkmark

Print (multi-route)

Printing Routes may be useful to Drivers that regularly pass through areas with limited cellular service.

1. Click on *Print* from the More Menu Action list.
2. Select *Print Route Map.*
3. Choose your print settings and click *Print.*

Print a Route Manifest (multi-route)

A Route Manifest is a summary of the Route, its Stops, Orders and other information. It can be printed as an HTML file or CSV (comma-separated values file) file.

- HTML— A line-by-line list of stops in sequential order, including breaks and layovers. It's easiest to read.
- CSV — Opens as a spreadsheet (e.g., Excel) where columns and rows can be filtered, sorted, or hidden. It can also be used as a primary backup method.

1. Toggle the file type you want to print (e.g., CVS).
2. Select the manifest type you wish to print from the dropdown — Stop, Order, or Line item.

3. Check the *Print with map* box if you wish to include the Route map on the last page.
4. Select up to two additional columns from each field drop down to add extra information to the printed manifests.
5. Navigate to the Prescriptive Intelligence section and set the Violations to *Not Important*. If you **do not** want the violation to be displayed. Violations are printed by default.

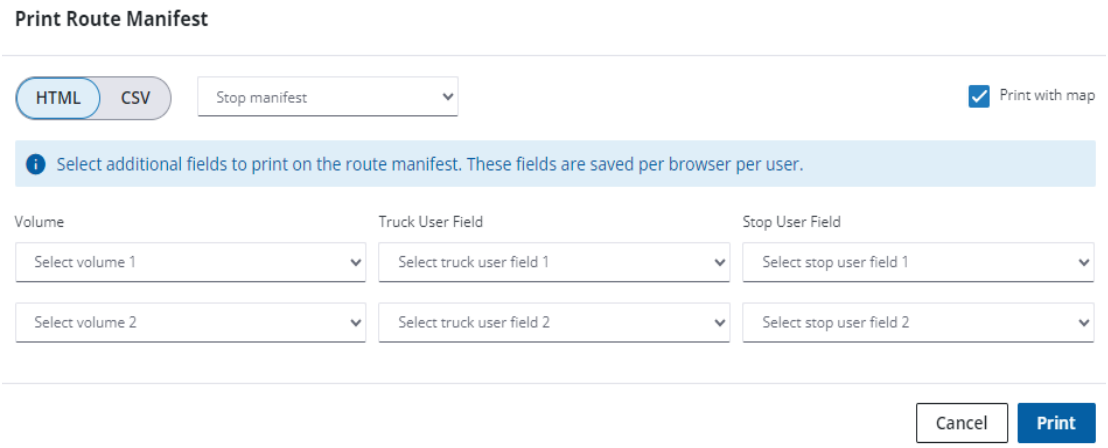

Figure 73 - Print Route manifest selection window

Individual Route Actions

The following actions are accessed through the *Route* card More Menu, and impact the **Individual Route only**.

1. Click the More Menu on the individual Route card.
2. Select the action you want to complete from the More Menu and complete the steps in the sections below.

- Delete Route
- Finalize Route
- Invert Route
- Optimize Sequence
- Reschedule Route
- Show Stop Summary
- Show Truck Info
- Unload Route
- Trim Expected Orders
- Vehicle & Nav Settings
- Enable Route Modifiers
- Print

Delete Route (individual routes)

This action deletes the individual Route.

- Unloaded Orders move back to the unloaded Order pool to be picked up by another Route. To learn how to Load the Orders onto a Route, see the Load an Unloaded Order section.

1. Select *Delete* from the Card's More Menu Action list.
2. Dynamic Route — Click on *Yes* to confirm; *No* to cancel.

   Fixed Route — Enter Delete then click on *Yes* to confirm.

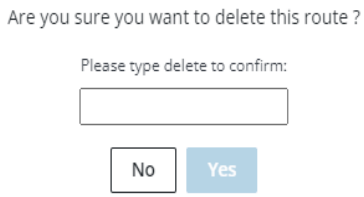

Figure 74 - Delete Fixed Route Confirmation Window

Finalize Route (individual routes)

This action works in the same way as the multi-Route option, but allows the user to finalize just an individual Route.

Select *Finalize Route* from the More Menu Action list. Finalized Routes are indicated with a checkmark.

Invert Route (individual routes)

The *Invert Route* feature allows users to flip the Route sequence and place the Stops in reverse order.

Click on *Invert Route* from the Card's More Menu Action list.

- Inverting Routes could result in Route violations. See Prescriptive Intelligence for further details.

Optimize Sequence (individual routes)

This action uses the Appian proprietary algorithm to place Stops on a Route in the best sequence while meeting all of the Preference criteria selected in the Algorithm settings. To optimize more than one Route, see the Multi-Route option.

Click on *Optimize Sequence* from the Card's More Menu.

- The system automatically optimizes. There is no preview window.
- A message (top right) displays the Mileage, Hours, and Cost savings for the optimized Route.

Reschedule Route (individual routes)

Change a Route without causing many disruptions. Changes made to loaded orders may alter any Route configuration.

Select *Reschedule Route* from the Card's More Menu Action list.

- The system recalculates the Route, including start and end time, drive time, departure and arrival times, and volume.
- The Route is modified to its most efficient routing configuration when the recalculation is complete.

Show Stop Summary (individual routes)

Stop details open in DR Track. See the DR Track User Guide for further summary table instructions.

1. Click on Show Stop Summary from the Card's More Menu Action list.

2. View the Stops in DR Track in another window.
3. Pay attention to warnings related to Route modifications.

Show Truck Info (individual routes)

This action allows users to view and edit Truck Information from a copy of the Truck Master Record. See Edit a Truck.

1. Click on *Show Truck Info* from the Card's More Menu Action list.
2. Make necessary changes in the Edit Truck window.
3. Click on *Save* to finalize edits.

Unload Route (individual routes)

Unload an individual Route to move unloaded Orders back to the pool for re-planning, and save the Route as a placeholder. To unload multiple Routes at the same time, use the multi-Route option.

- Unloaded Routes with Remote Redispatch Stops do not move to the Unloaded Orders list, rather they disappear.

1. Select *Unload* from the Card's More Menu Action list.
2. Click on *Yes* to confirm, or *No* to cancel.

To learn how to Load the Orders onto a Route, see the Load an Order section.

Trim Expected Orders (individual routes)

This action works the same way as the multi-Route Option, but allows you to trim just one Route. Click here for details.

Vehicle & Nav Settings (individual routes)

Apply a variety of settings to customize a Route. To customize multiple Routes in the Branch at one time, click here.

1. Click on the *Vehicle & Nav Settings* from the Card's More Menu Action list.
2. Set the Vehicle Configurations. For an explanation of configurations, see Vehicle and Nav Settings (multi-Route).
3. Tab over to the *Avoids and Favors* section and select your preferences.
4. Click on *Save* to finish configuring.

Enable Modifiers (individual routes)

Click on *Enable Route Modifiers* to quickly use the established Vehicle and Navigation settings on that individual Route.

- This action overrides the default settings made in Preferences.

Print (individual routes)

Printing a Route may be useful to Drivers that regularly pass through areas with limited cellular service. The print action works the same for an individual Route as it does for multi-Routes. For further instructions or to print multiple Routes at one time, see the Print (Multi-Routes) Section.

Lock A Route (Individual Routes)

Lock a Route to prevent unwanted changes when unloaded Orders are added or Sequence is Optimized. There are three different locks that you can apply to the Routes:

- **All Changes** — Prevents stops from being added or removed. Stops can only be re-sequenced.
- **Loading Orders** — Prevents new Stops from being added. Stops can be removed and / or re-sequenced.
- **Unloading Orders** — Prevents Stops from being removed. Stops may be added and / or re-sequenced.

1. Hover over a locked Route to see the type of lock(s) already applied.

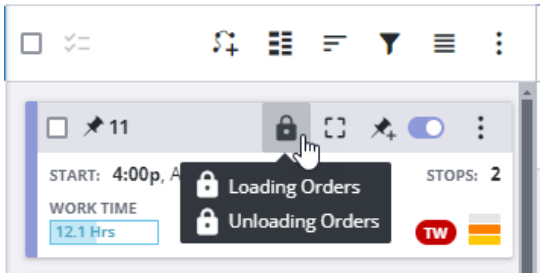

Figure 75 - Sample Route is locked to prevent Loading and Unloading orders

2. Click on the desired lock. Available lock options are grayed-out. Locks in use are blue.

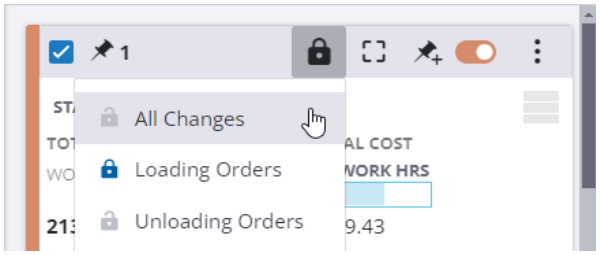

Figure 76 - All Changes and Unloading Orders locks available

3. Click any blue lock to remove it.

Remote Redispatching

Remote Redispatch lets Daily Planner insert special Remote Redispatch Stops into a Route so a vehicle can effectively reset capacity mid-route, without returning to the terminal. Remote Redispatch Stops behave like Stops for sequencing and auditing, with some restrictions. Learn more about Remote Redispatching below:

Enable Remote Redispatch Locations

To enable Remote Redispatch Locations the user must complete the following:

1. Designate at least one Remote Redispatch account — Ensure the box is checked for every account you wish to use as a Remote Redispatch location.
   - Accounts marked as a Remote Redispatch location are identified in the *Accounts* table with a triangle.

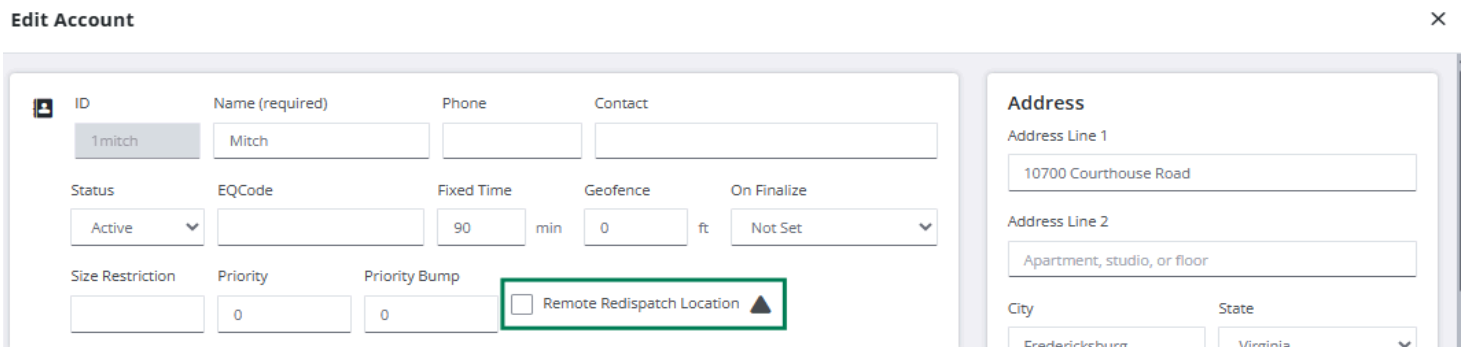

Figure 77 - Designate an account as a Remote Redispatch location

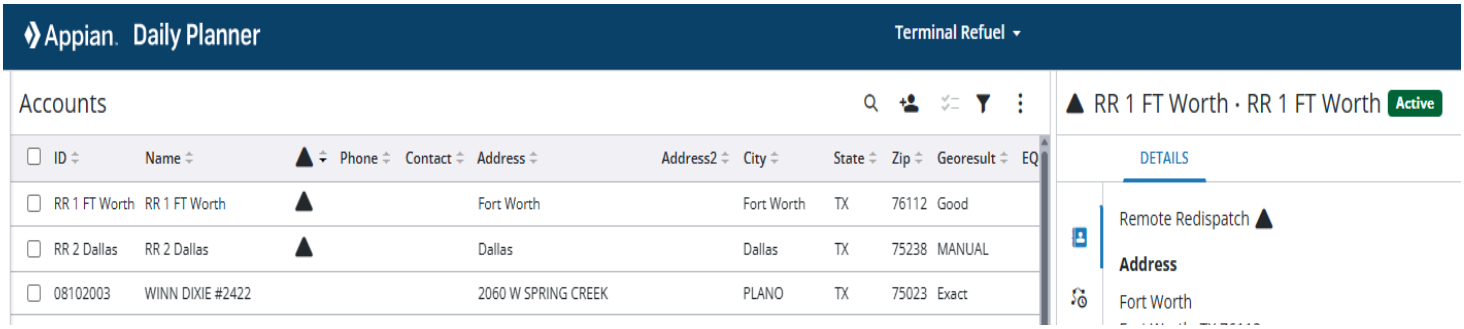

Figure 78 - Redispatch indicator in Accounts Table

2. Identify Trucks that qualify for Remote Redispatch — Toggle the *Redispatch* button for each Truck eligible.

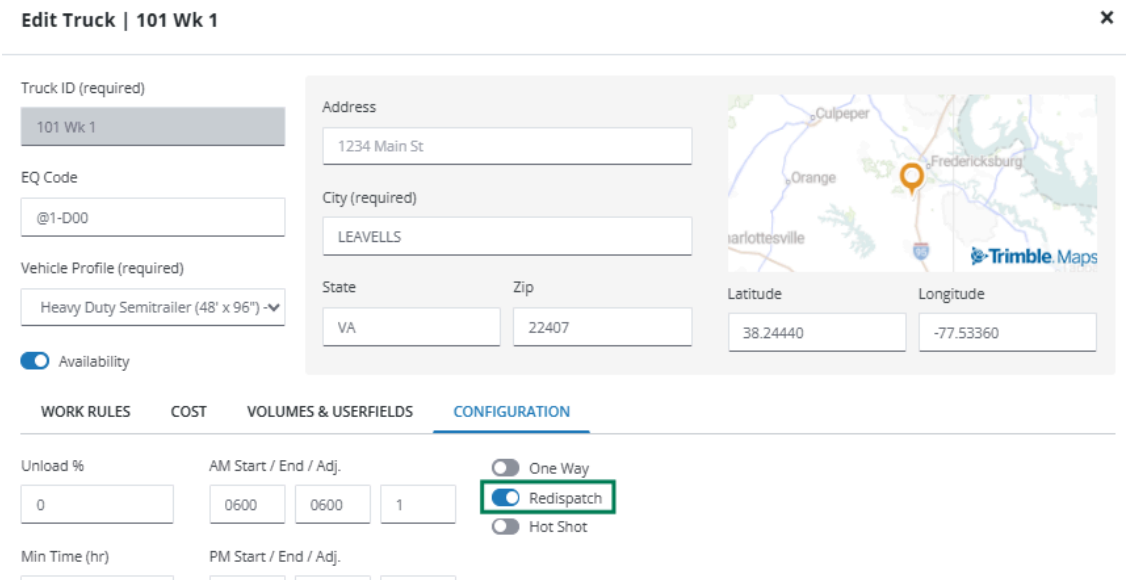

Figure 79 - Truck Profile Redispatch button

3. Select from these account and truck options while using the Route Building Wizard. After the Route is built with Remote Redispatch locations, these locations appear as triangle icons in multiple places:
   - **Maps (Route Planning / Dispatch)** — Triangle marker indicates Remote Redispatch Stops.
   - **Route details list panel** — Remote Redispatch Stop rows/ cards/ grid.
   - **Remote Redispatch Locations (Show On Map)**
     - Enabled — Shows all existing Remote Redispatch points on a given Branch, in the current map.
     - Disabled — Shows only loaded Remote Redispatch Stops on the map.

Remote Redispatch vs Terminal Accounts

Terminal accounts work differently than non-terminal Remote Redispatch locations.

- Terminal Stops are **not configured as Remote Redispatch accounts**, therefore the Remote Redispatch checkbox is hidden for the Terminal accounts.
- Terminals are not displayed differently when used as Remote Redispatch points. They appear as normal terminals.
  - Terminals do not appear on the Remote Redispatch map layer.
- Routes that return to a terminal, as part of Remote Redispatch behavior, become multi-leg and use Truck Turn Time instead of Account Fixed Time.
- If the distance between any non-terminal Remote Redispatch point is more than half the distance to the terminal, the terminal is used. (Based on distance type selected in Preferences> Algorithm> Distances> Calculate Distances By).
  - Distance to refuel point > (distance to terminal / 2) = use terminal
  - Distance to refuel point < (distance to terminal / 2) = use Remote Redispatch point

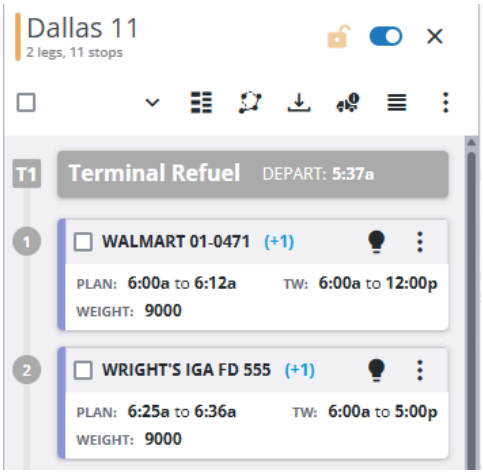

Figure 80 - Non-terminal redispatch point in Route details

Remote Redispatching and Route Modifications

Remote Redispatch points are treated as special Stops and some actions have constraints.

- **Move Stops (Drag and Drop)**
  - Moving a Remote Redispatch Stop updates the Route stats.
  - Manually moving a Remote Redispatch Stop can result in violations.
- **Optimize Sequence**
  - The Optimize Sequence tool will not add or remove Remote Redispatch Stops and does not treat Remote Redispatch Stops as candidates. It can reorder other Stops.
  - Remote Redispatch Stops may shift position within a Route or be removed if the algorithm determines they are no longer needed.
- **Optimize Routes**
  - Remote Redispatch Stops **DO NOT** move to other Routes.
  - The Optimize Routes tool **DOES NOT** add Remote Redispatch Stops.
- **Unload stop**
  - Remote Redispatch Stops can be unloaded like normal Stops.
  - Unloaded Remote Redispatch Stops do not move to the Unloaded Orders list, rather they disappear.

Stops Cards

The Stop list is organized in much the same way as the Route list. The list contains a toolbar with icons for quick actions, a More Menu for additional management, and customizable Stop cards. Click on a Route to display the Stops list.

By default, the *Stop* card has a header row and Stop-specific information.

- Cards are shown in sequential order from top to bottom.

- The blue number in parentheses on each *Stop* card indicates the number of Orders in a Stop.
  - If the number is (+2) or higher, it is a consolidated Stop, and the number reflects the Stop Order count.
- Cards have an E before the Stop account name when Stops are on Fixed Routes with expected orders.
- View *Stop* information by clicking the number at the top of the card.
- Hover over the Stop card to highlight that Stop on the map.
  - Scroll through each Order's information using the small arrows at the bottom of the expanded card.

Stop Card Header

The Stop card header (or toolbar) displays the following: 1.) Account Name 2.) Number of Orders within the Stop (see Consolidated Stops) 3.) Light bulb icon for suggested Routes 4.) More menu (three dots).

Stop-Specific Information

The following is by default, but you can add more Stop-specific information to the cards using the Card Layout Editor.

- Each Stop's planned arrival and departure times, including the time window (TW).
- Equipment code (EQ) and Boundary code, if you are using a Boundary file.
- Any Violations present in the Route

Suggested Routes (Stops)

The Suggested Routes feature uses the Daily Planner's algorithm to determine the best Route for a Stop (or Unloaded Order) while taking into account all violations.

a. Select the Stop (or unloaded Order) that needs to be loaded onto a Route.

b. Click on the lightbulb at the top of the card (lightbulb turns blue when in use).

c. Review the Route Suggestions to determine the best option based on time, distance, cost and Route sequence, etc.

d. Click on *Load* to add the Stop to a top suggestion or click *Load More* to see the expanded list of Route suggestions.
- If the address and/ or account for multiple orders match, the Stops are consolidated (Manage Consolidation Rules under Consolidations in the Preferences section).

e. Confirm the Stop has been added to a Route with the confirmation message in the top right corner of your screen.

Figure 81 - Suggested Route window

Stops Toolbar

Some actions in the Stops Toolbar are similar to the quick actions for Routes. In the Stops Column, users can change the Route name, adjust start dates and times, change truck profiles and IDs, edit the Stop Cards, Optimize Stop sequences, unload the Route, show Truck info, toggle to grid view, and use the More Menu for additional actions.

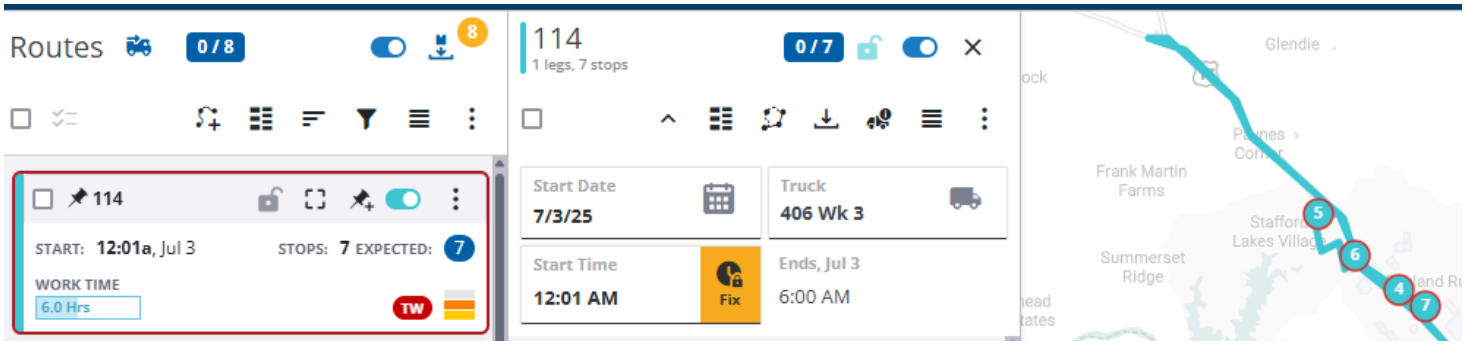

Figure 82 - Stop card for Route 114 - Future Route with expected Stops

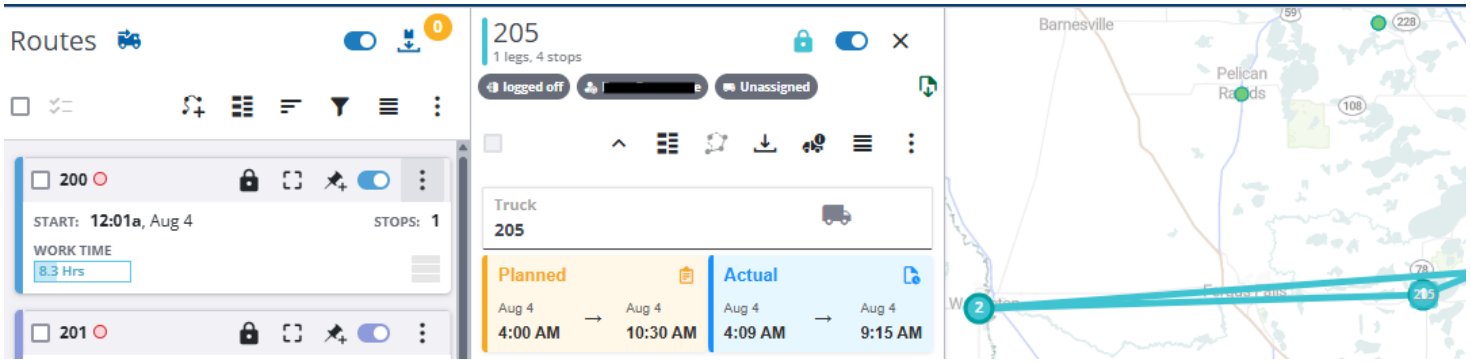

Figure 83 - Stop card for Route 205 - Current Route with Planned and Actual times

Change Route Name

Branches should not have multiple Routes with the same name. This can occur unintentionally when Truck profiles or IDs are updated. To change the Route name, follow these steps:

1. Click on the Route that needs to be renamed to open its Stops list (See *Figure 83* above).
2. Click on the Route name at the top of the list to open the editing box and enter the new Route name.

Adjust Start Dates and Times

1. Click on the Route card that needs to be adjusted to display the Start Date and Time in the Stop Column.
   - Use the caret (^) in the header to hide/ unhide this panel.

2. Click on the Date to type in or select a new date from the calendar.
    - If the Start Date is adjusted beyond the dates selected in the Route planning date picker, the Route may fall out of view based on the settings enabled (See the explanation here).

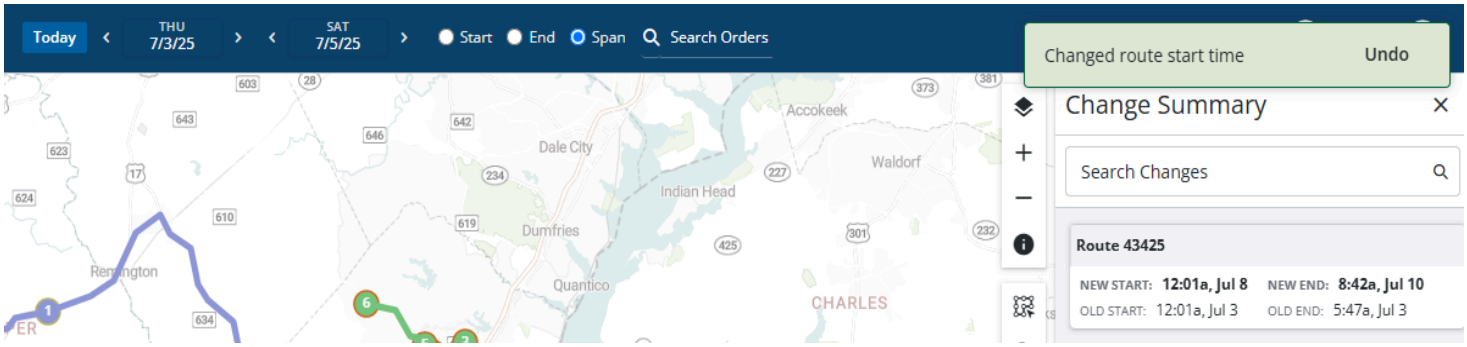

Figure 84 - Change summary notification

3. Click on the Time to enter the new start time, and click on *OK*.
4. Determine if the time should be Fixed or Floating.

Change Truck Profiles and IDs

1. Click on the Route card that needs edits to display the truck button in the Stop Column.
    - Use the caret (^) in the header to hide/ unhide this panel.
2. Select or search for the desired Truck Profile then select the associated Truck ID.

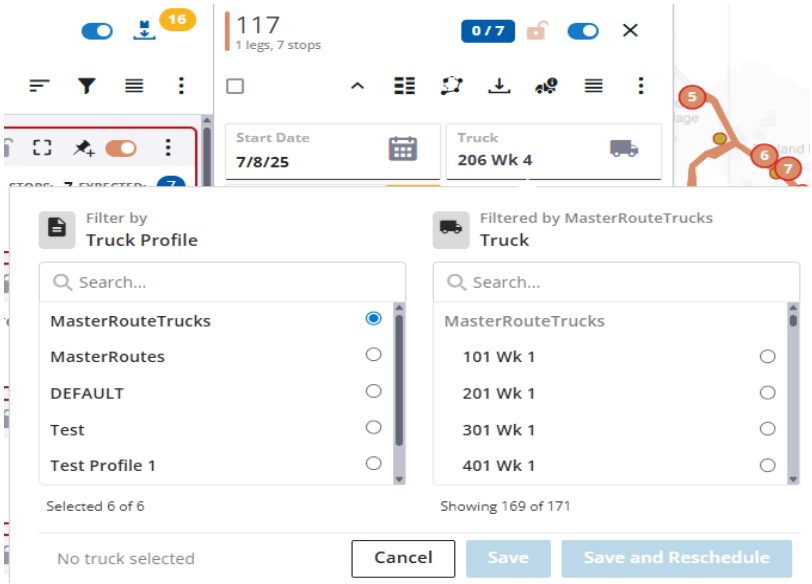

Figure 85 - Edit Truck Profile and IDs window

3. Click on *Save* to change only the Truck Profile / ID, or *Save and Reschedule*.
4. View the confirmation message in the top right, and determine if the Route name should change.

a. Click on *Change Route Name* to avoid having multiple Routes with the same name.
b. Ignore to proceed without a name change.

Stop Card Layout Editor

See instructions found in the Route Card Layout Editor section.

Optimize Sequence (Stops Card)

Use the Optimize Sequence icon in the header of the Stop list after Pinning a Route.

- There is no preview window.
- A message appears (top right) displaying the Mileage, Hours, and Cost savings for the optimized Route.

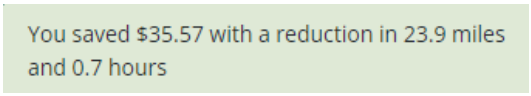

Figure 86 - Optimization confirmation message

Unload Stops from a Route

Manage Stops and Routes with quick action icons.

1. Click on the Route that needs to be unloaded to populate the Stops cards.
2. Check the Stops that need to be unloaded from the Route.
3. Click on the *Unload Route* icon in the Stops toolbar.

Show Truck Info

The Show Truck info icon allows users to quickly access the ADP *Edit Truck* window for Truck management and configuration. Make the necessary edits and click on the *Save and Reschedule* button.

Stops Grid

Stops are viewed as cards by default. Use the hamburger button (three lines) to toggle between cards and the data grid.

- The grid is a non-resizable two-pane window with all of the same functionality as the cards (See *Figure 87* below).
- Select the arrow next to the Order to expand and view or configure the line items.
- Drag Order rows into existing Routes, or create new Routes.
- Scroll right (bottom of list) and click on the Configuration button (top right of list) to configure columns, fields, or volumes (see *Figure 87* below). Configured data is retained between sessions.
    - Drag the headers left or right to rearrange the order of columns

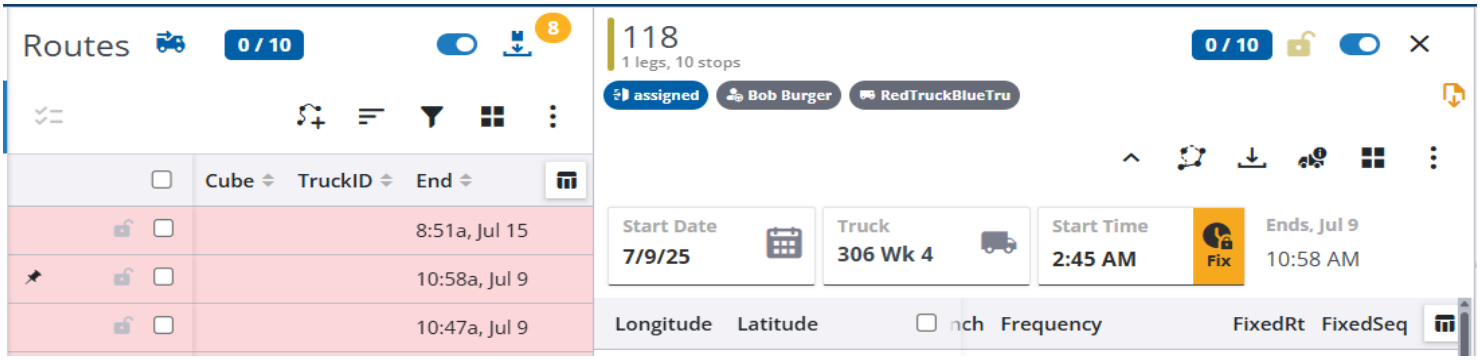

Figure 87 - Route and Stop grid view with Route 118 assigned

Stops More Menu

The Stops list contains a More Menu for multi- Route/ Stop actions and individual Stop actions. Most of the More Menu actions are the same as the Routes actions and instructions can be found in their respective sections: Invert Route, Stop Summary, Finalize Route, Delete Route, Trim Expected Orders, Vehicle & Nav Settings, and Print.

Edit Stop Details

Stop Details are edited in DR Track. To edit the stop information:

1. Click on the Route card to populate the Stops list.
2. Locate the Stop that requires edits.
3. Click on the card's More Menu Action list and select *Stop Details*.
4. Edit the necessary information in the DR Track window.

Unload Stop

Orders can be unloaded from Stops just as Stops can be unloaded from Routes.

1. Navigate to the Stop card that needs to be unloaded.
2. Click on the More Menu Action list and select *Unload Stop*.
   - The system automatically returns the Orders to the Unloaded Orders list.

8 Unloaded Orders Cards

The Unloaded Order list provides users with basic Order information for the selected Branch and Route Dispatch date (or a selected date range). The list is organized in much the same way as the Stop and Route list — a toolbar with icons for quick actions, a More Menu for additional Route and Order management, and customizable Order cards.

By default, the Unloaded Order card has a header row and Order-specific information.

Unloaded Order Header

The Unloaded Order header (or toolbar) displays the following: 1.) Order's Account Name 2.) light bulb icon for Suggested Routes 3.) More menu (three dots) for additional Order actions.

Unloaded Order-Specific Information

The following is by default, but you can add more Unloaded Orders information using the Card Layout Editor.

- Each Unloaded Order’s estimated ship date and time window.
- Equipment code (EQ)

Suggested Routes (Orders)

The Suggested Routes function works the same way for both unloaded Orders and Stops. For instructions, see the Suggested Routes section under Stops Card.

Unloaded Orders Toolbar

The actions available in the Unloaded Orders Toolbar are much the same as the quick actions in the other lists’ Toolbars. Users can set Start and End dates, edit the Order Cards, filter and sort, toggle to grid view, and use the More Menu for additional actions.

Set Start and End Dates

Set the start and end date of the delivery window for the unloaded Orders. See Branch Date Picker for more details.

1. Check all of the unloaded Orders that need dates established.
2. Click on the Calendar icon and set the Start and End date.

Unloaded Orders Card Layout Editor

See instructions found in the Route Card Layout Editor section.

Filter and Sort Unloaded Orders

The filter and sort for Unloaded Orders works the same as the Route filter and sort functionality in the Routes panel.

- When the Unloaded Orders are filtered, it also filters the Unloaded Orders Statistics pane within the Solution Statistics panel, and visa versa. These sections are synced.

Unloaded Orders Grid

Unloaded Orders are viewed as cards by default. Use the three lines to toggle between cards and data grid.

- Use the caret icon (^) to expand or collapse the panel.
- Resize by clicking and dragging the grey bar at the top of the pane.
- Select the arrow next to the Unloaded Order to expand and view the line items.
- Click the Configuration button (right of the grid) to add or remove columns like shipping address and Order frequency. Configured data is retained between sessions.
    - Scroll left and right to view all of the columns. They do not resize based on the number of columns selected.
    - Drag the headers left or right to rearrange the order of columns (this is saved between sessions).
    - Select a column header to sort the data in ascending or descending order.
    - Click on the More Menu and select *View with Pagination* to change the scroll settings.

Unloaded Orders More Menu

The Unloaded Orders list contains a More Menu for multi- Route/ Order actions and individual Order actions. Some of the More Menu actions have been covered previously and instructions can be found in their respective sections like Build Route, Create Route, Assign POI. Geocode orders can be found below.

Load an Unloaded Order

Incoming Orders are placed in the *Unloaded Orders* list. These Orders are ready to be loaded onto a Route.

Use the *Load Unloaded Orders* workflow to choose the most optimal Routes:

1. Select all the Unloaded Order(s) you want to load from the Unloaded Orders list.
2. Click on the More menu in the list (not the card), and select *Build Route*.

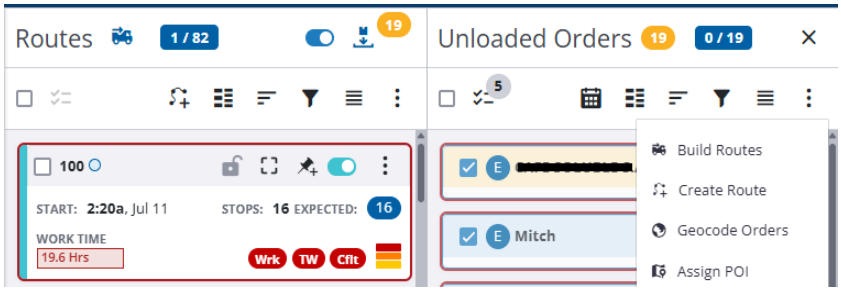

Figure 88 - Unloaded orders list with the multi-Route More Menu open

3. Follow the instructions in the Build Route section.

Orders can also be loaded using a drag and drop approach. Simply click anywhere on the Order card / row and drag it into the desired Route.

GeoCode Orders

Daily Planner notifies the user if an unloaded Order needs to be geocoded. If ADP highlights unloaded Order(s) in yellow complete the following steps:

1. Use the Multi-Select tool to select every Order you want to geocode.
2. Click on the Unloaded Orders icon at the top right of the *Route* panel to maximize the Unloaded Orders panel.
3. Right-click on the Unloaded Orders panel, and select *Geocode Orders.*

Individual Orders can also be geocoded by selecting *Geocode* from the Unloaded Orders card More Menu.

Order Details (Edit an Unloaded Order)

Unloaded Order edits are done in DRTrack. There is not an option to edit them in ADP. To edit the Order details:

1. Click on the *T*oggle Unloaded Orders icon in the Route Planning toolbar.
2. Select the More Menu (three dots) on the desired Unloaded Order card.
3. Click *Order Details* from the list, and make the necessary changes in the DRTrack window.

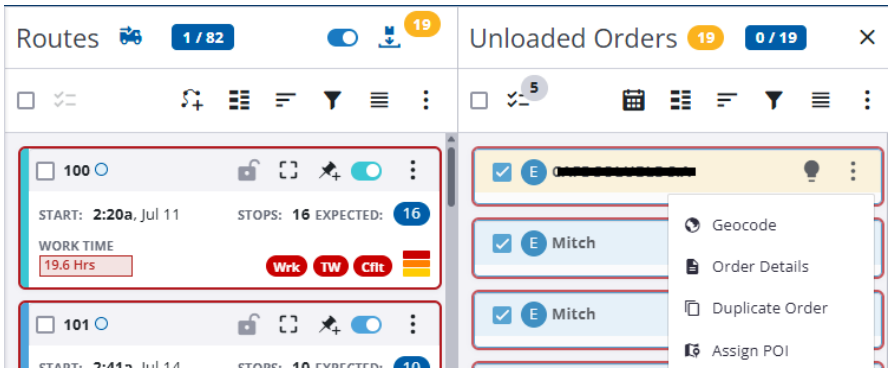

Figure 89 - The Unloaded Orders card More Menu options

Duplicate Order

When customers have repeat Orders they can be duplicated for quick loading and Route management.

1. Click on the Order that needs to be copied.
2. Click on Duplicate Order and the system will automatically add that Order to the Unloaded Orders list.

Importing Orders into Daily Planner

Customers using both DRTrack and DirectRoute may find Daily Planner useful for building daily Routes. Order integration methods include upload from DirectRoute, Order Import Service (OIS), or web service integration.

- If Orders and Truck Profiles exist in a user's instance of DRTrack, they are available in Daily Planner.
- Export to ADP following the same steps for exporting Orders and Truck Profiles from DirectRoute to DRTrack

Routing Map

The Route Planning map interface allows users to choose different map styles along with traffic and weather overlays. There are also a variety of tools to customize the map view and create Routes.

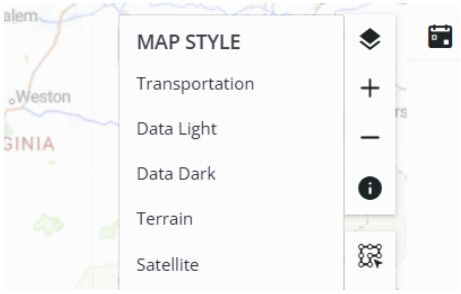

Figure 90 - Routing map style and displays

Lasso Stops

The Lasso Tool allows you to create a Route on the map by drawing a lasso around the unloaded Orders (red circles).

a. Click on the Lasso in the Map tools.

b. Surround the stop by clicking on points in the map.

c. Double-click the last point of the lasso to finalize it.

d. Right click and select Create (Fixed) Route.

e. Select the Truck Profile and Truck ID for the Route.

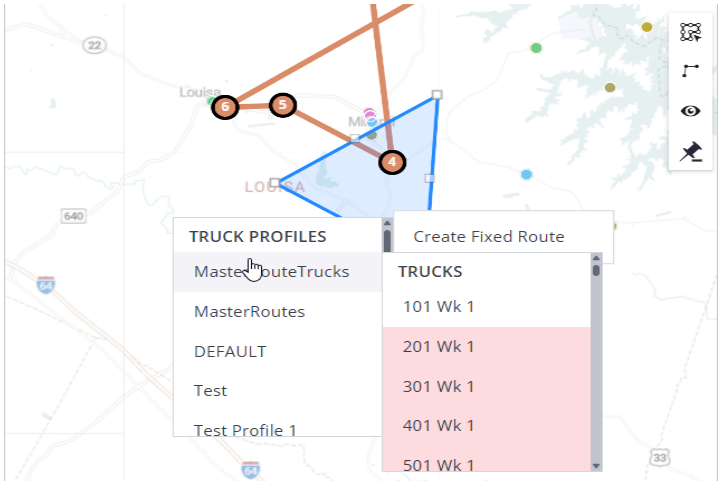

Figure 91 - The Build a Route option from the Lasso tool

Once the Route is created on the map, a corresponding Route card is created within the Route list.

Route Line Styles

Route lines are drawn between stops two different ways:

1. **Crow fly style** — Lines are measured using a direct, straight line between two Stops.
2. **Road network** — Lines are measured using the road network which may not be as direct, but it is more accurate.

Show On Map

Show or hide a variety of Route-related data on the map. Any item not selected in *Show on Map* falls under the *Hidden* category. When Toggled on:

- **Unloaded Order** — The map displays the unloaded order as a red circle with an E in the center.
  - **Multiple Orders** — Displayed on the map as a black circle.
  - Click on the black dot to see the list of Orders; click on the individual Order to see the details (see *Figure 93)*.

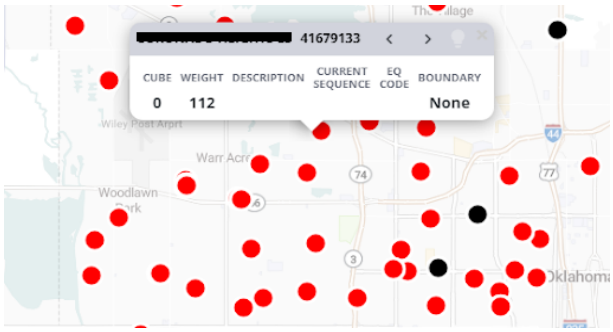

Figure 92 - Single Order stop

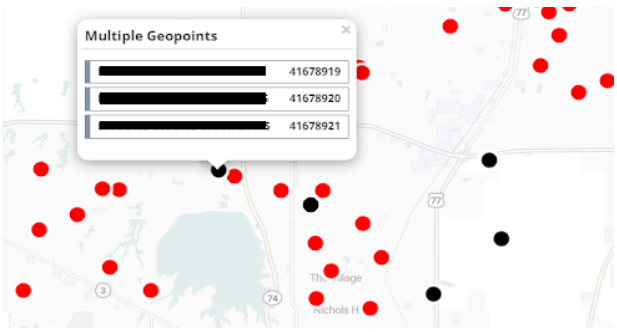

Figure 93 - Multi-Order stop

- **Loaded Stops** — The map displays the Stops as color-coded circles.
  - Colors coordinate across Stop circles, Route cards, and Stop cards; however the colors are not customizable.
  - Hover over the Stop circle to display its card; click on the circle to see Route details.
  - Use the arrows in the card header to cycle through the Stops in the Route.

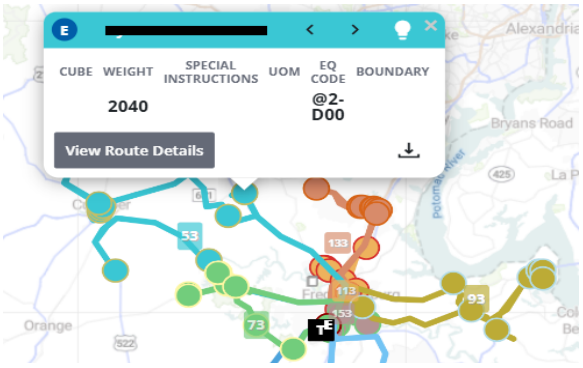

Figure 94 - Map with several Routes, Stops, and a Stop Card

- **Route lines** — The Color-coded Routes are displayed based on the line style selected.
- **Stem Lines** — Segments of the Route coming or going from the terminal.
- **Stop Sequences** — The map shows a number in every circle indicating its Stop position within the Route.
  - Use the arrows in the card to cycle through the Orders in the Stop.
- **Route Name and Truck Name** — The names appear inside of color-coded boxes near the Route center.
- **Terminal** — The Starting and Ending point for each Route in a Branch is displayed on the map as a T symbol.
- **Remote Redispatch Locations** —Displays the accounts identified as Remote Redispatch Locations (triangles). If there are no designated locations, this option is not available.

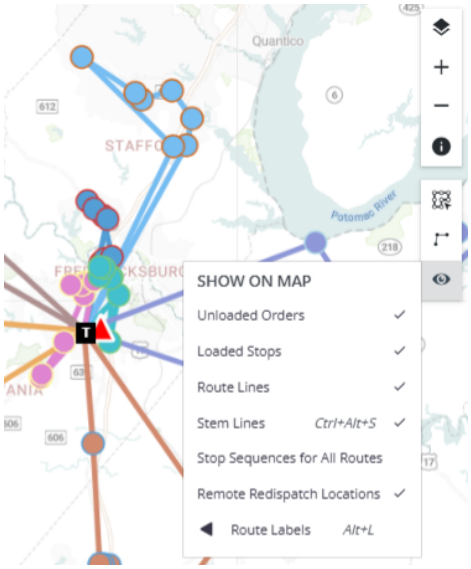

Figure 95 - SHOW ON MAP legend

Solutions Statistics

Solution Statistics is an expandable panel providing three tabs of information including the following:

- Number of Routes and Stops created (numbers may differ depending on consolidated stops)
- Number of Orders and unloaded Orders on Routes
- Mileage, cost, and work hours of all Routes

Click on one of the tabs below the map to access the information: Orders, Route Comparison. Solution Comparison.

Orders

Provides information about the Orders loaded on Routes and any unloaded Orders per dispatch date selected. Compares against previous business day's quantities and volumes established in Alias Preferences.

- Use the Calendar button to change comparison dates.
- Use the filter button to narrow the view to either received orders, expected orders, or bad geocodes.

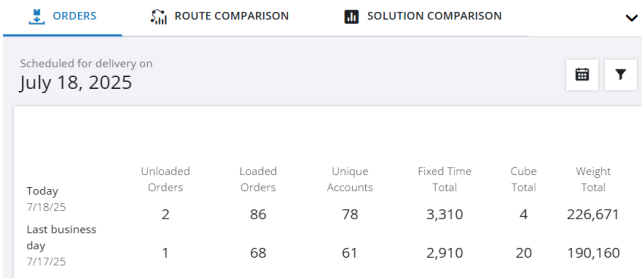

Figure 96 - An sample Order comparison between the current and previous dates

Route Comparison

Provides several charts to compare Route data side by side. Route bar colors correspond with the Route card colors.

1. Click on a bar to: 1.) pin that Route 2.) open the Stop list for that Route and, 3.) highlight the Route on the map.
2. Select another Route bar to pin and compare.
3. Select one of the comparison fields from the drop down: Cost, Distance, Drive Hours, Stops, Work Hours, or Volume.
4. Use the sort and filter options to organize and refine the chart.

Figure 97 - A sample Route Comparison based on cost

Solution Comparison

Compares today's dispatched solution against any other previous dispatch day, week, or month.

- **Solutions Statistics** — Analyze miles, cost, hours, and violations for two Routes and dispatch dates.
- **Solutions Totals** — Review solutions totals, in chart form, by: Cost, Miles, Stops, Hours, and Volume.
- **KPIs** — Compare Key Performance Indicators by dispatch date.

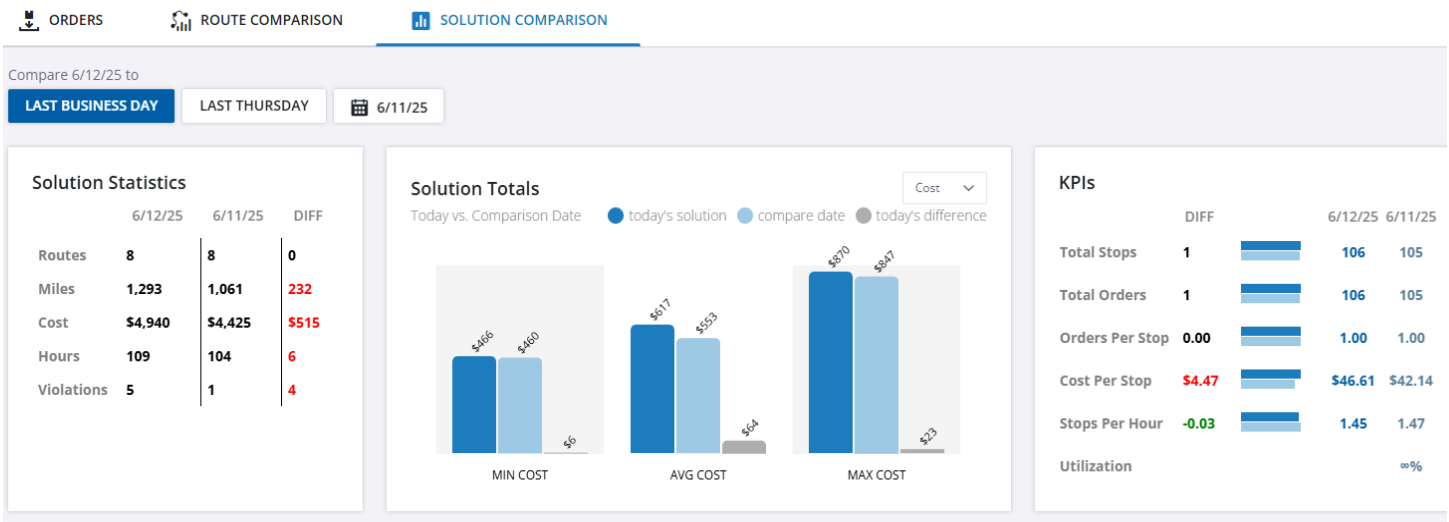

Figure 98 - Solution Comparison charts and tools

Dispatch

The Dispatch page allows users (one user per branch per session) to assign Drivers, Devices, and Assets to the Routes being created. It also has notification options and an export feature for Route tracking and operational visibility. The Dashboard appears when at least one Route is dispatched before logging into the Daily Planner.

- See the Branch Date Picker section under Route Planning for information on Branch dates and selection options.

Assignment Table

The Assignment table is a customizable and expandable data grid with a Toolbar for various actions and information about each Route. It includes the export status, planned and actual start times, assigned resources, and any scheduling conflict.

The table is customized two different ways:

- Click on the header of each column and drag it to the desired order on the table.
- Scroll to the right of the table and click on the Configuration button to add or delete columns to/ from the table view.

Assign Drivers, Devices, & Assets

The table allows users to pre-assign Drivers, Devices and /or Assets to Routes. To preassign a Route:

1. Select the Route that needs to be pre-assigned.
2. Select the appropriate Driver, Device, or Asset from each dropdown, and the system assigns automatically.
    - See the Organization & Management section for instructions on creating a Driver, Device, and Asset.
3. Click on the row to see the planned Stops and the Route on the map.
    - The Dispatch Map has the same tools and styles as the Route planning map.

Each Route, for the selected date and Branch, has color-coded information that corresponds to the assignment status:

- White — Unassigned and not logged in
- Blue — Preassigned and not logged in
- Green — Assigned and logged in
- Grey — Assigned and logged off
- Orange — Route was completed out of sequence

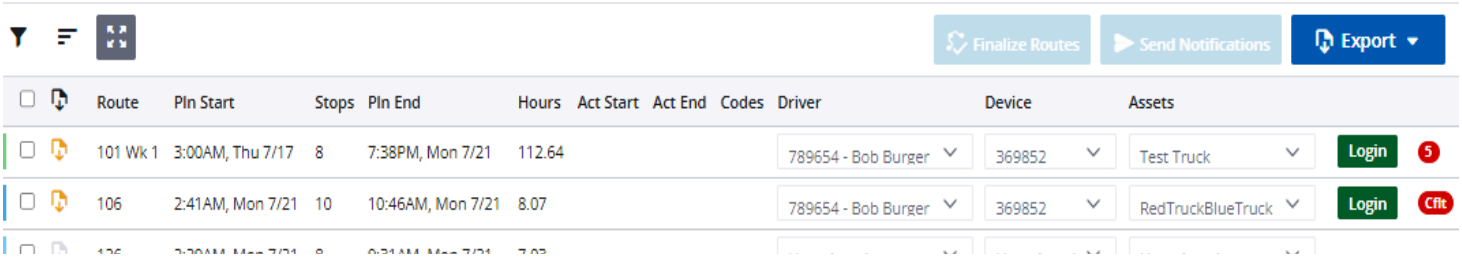

Figure 99 - Assignment Table with an Asset assigned, and a Stop delivered out of sequence

Edit a Pre-assignment

For Routes that have **not been logged in**, editing the pre-assignment is done the same way as creating a pre-assignement in the section above. To unassign a Route, complete the steps below:

1. Determine if the Driver has logged into the Route.
   - If the Driver has **Not** logged in, move to Step 2.
   - If the Driver has logged in, undo the login event before moving to Step 2 (See Section below for instructions).
2. Navigate to the Route requiring unassignment.
3. Select *Unassigned* from the dropdown menu for each resource that needs unassigned, or right-click on the Route row and select *Unassign* to complete the task for all three resources at once.

Conflicts and Violations

All conflicts and violations are displayed with color-coded badges. A number in the badge indicates multiple violations. Hover over the badge to determine the issue. Set violation priorities under Prescriptive Intelligence. See the Violations Table for definitions.

Dispatch Toolbar

The Dispatch Toolbar provides users the ability to filter and sort Routes for assignment, finalize Routes, Send Notifications, Export Routes, and reschedule.

Filter Dispatched Routes

The data grid can be sorted very similarly to the Unloaded Orders or Routes. Filter the table by the following fields. Click on the filter funnel icon for the options.

- **Unassigned** — Route has not been assigned a resource (Device, Driver, or Asset).
- **Preassigned** — Route has been assigned at least one resource.
- **LoggedIn** — The Driver has logged in to the Route.
- **Logged off** — The Driver has logged off of the Route.
- **Not Logged In** — The Driver has not logged in to the Route yet.

Sort Dispatched Routes

Sort the Dispatch table by Route Planning variables, Dispatch fields, Volume settings, and User fields. Click the Sort icon for a list of options in the drop down menus (see *Figure 92* below).

- The Planning variables are set on the Route page, and the Volumes and User Fields are set in DR Track and managed on the Preferences page under Aliases.

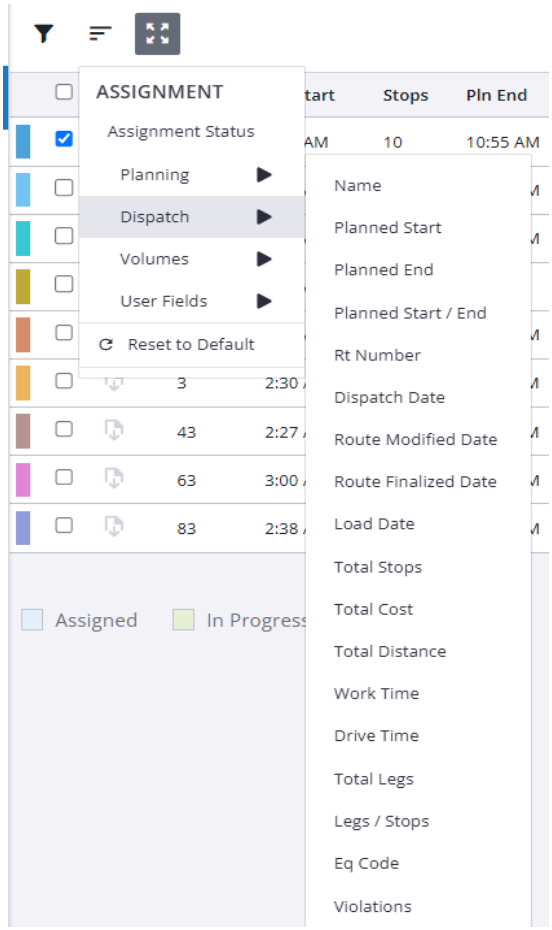

Figure 100 - Sorting options for Dispatched Routes

Finalize Dispatched Routes

The Finalize Routes action on the Dispatch page completes the same action on the Route Planning page. It identifies Routes ready to be integrated into the ERP or TMS system to allow focus on the completed Routes while avoiding the ones still in planning.

1. Check the Routes you wish to finalize.
2. Click on the blue *Finalize Routes* button in the toolbar, then view the confirmation message in the top right corner.

Send Notifications

The *Send Notifications* feature is a licensed service used to send Routes and Order status notifications to the Customer Communication Manager (CCM).

1. Check the Routes in the table you wish to send to the CCM.
2. Click on *Send Notifications* in the Toolbar.

Export Routes

Use the *Export* button to export multiple or individual Routes to a variety of mobility and tracking integrations for mobile client applications. This allows ADP to be used for Route tracking and operational visibility during the execution of the Routes. Routes that have been changed after initial export require a re-export following the same instructions below.

Users may be required to do the following based on the telematics/ mobile integration chosen:

- Preassigned Drivers before exporting Routes
- Export a Route to distribute Route plans to Drivers

Individual Routes

1. Right-click on the individual Route row, and click on *Export*.
2. Select the Device type to export to (based on the integration package available).

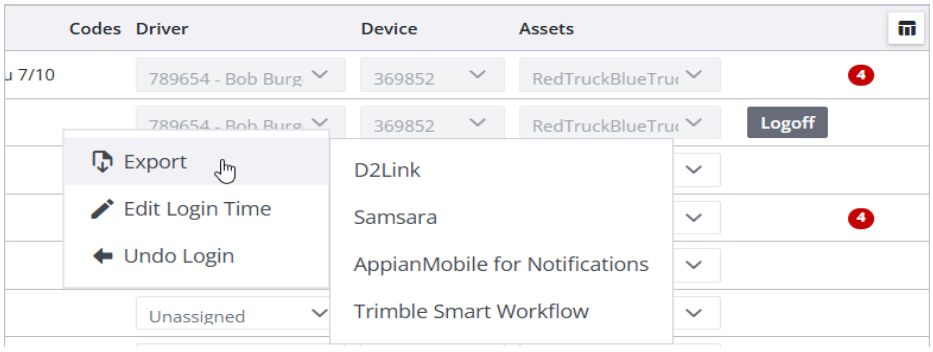

Figure 101 - Exporting an individual Route

Multi-Routes

1. Check the boxes next to each Route you wish to export.
2. Click on the *Export* button in the Toolbar.
3. Select the Device type to export to (based on the integration package available).

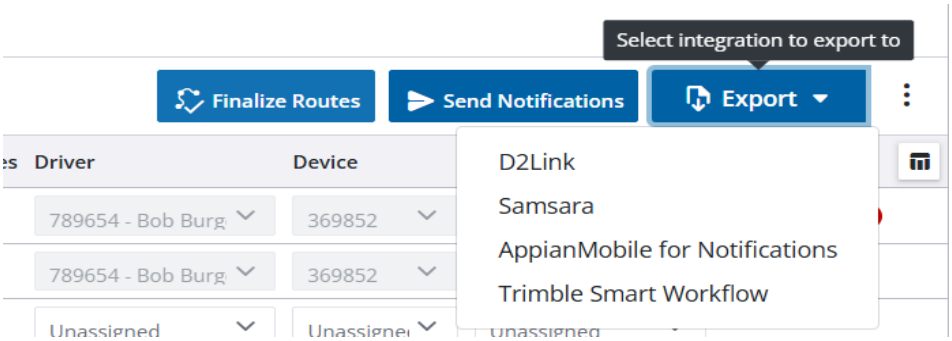

Figure 102 - Export multiple Routes

The status is displayed in the table with a color-coded export icon to the left of the Route number. Hover over the icon for the export status.

- Grey — Route is unassigned and not exported
- Orange — Route is preassigned but not exported
- Green — Route has been exported
- Red — Route has been exported but changed, and needs to be re-exported

Reschedule Dispatched Routes

Reschedule Routes using the More Menu in the toolbar (multi-Routes selection) or the More Menu in the individual Route row in the table.

1. Click on the Route(s) that need to be rescheduled.
2. Click on the More Menu, and select *Reschedule Routes.*
3. View the confirmation message in the top right corner.

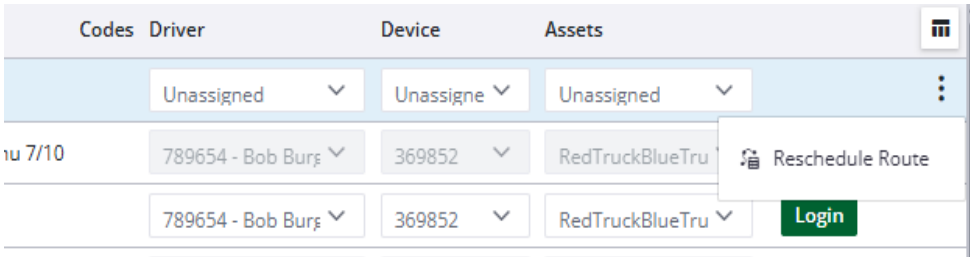

Figure 103 - Reschedule Dispatched Routes using the More Menu option

Manual Login / Logoff

A dispatcher may want to manually log a Driver into or log a Driver off of a Route rather than using a telematics or mobile integration. Click the appropriate *Login* or *Log off* button on the assignment row (The time is set when the icon is clicked).

Undo Login/ Logoff

Cancel a login or logoff that occurred by accident or needs to be canceled.

1. Right-click on the Route and select the appropriate *Undo Login* or *Undo Logoff* button.
2. Confirm the action to remove the login event.

Edit Login Time

The login time of a Route can be updated if adjustments are required.

1. Right-click on the logged in Route and select *Edit Login Time*.
2. Change the start date and /or time of the Route login.
3. Click on *Change* to save the edits.

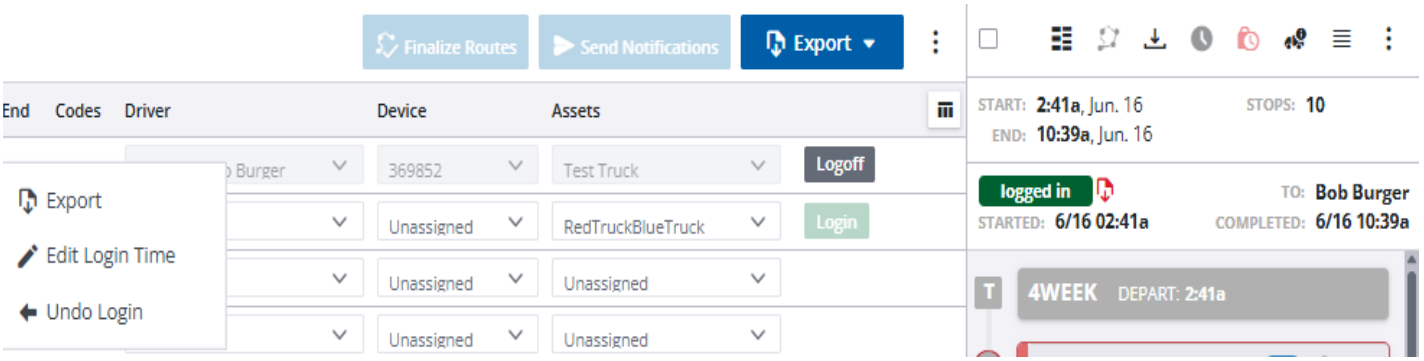

Figure 104 - Assignment table with Edit Login Time option for assigned Driver.

Boundaries

The Boundaries Page allows users to upload Boundary files to be used in the Routing algorithm. Unlike dynamic routing, the algorithm looks for Orders within each boundary and builds appropriate Route ensuring the Orders are matched with Assets and Drivers within those boundaries. It may not be as efficient as Dynamic Routing, but it is less disruptive.

Dynamic Routing:

- Implementing fully dynamic routing can be disruptive to the rhythm of an organization, and create significant daily routing changes for Drivers — Each workday can be very different.
    - Organizations need to determine how much daily disruption makes sense for its Drivers and their organization.

Boundary Routing:

- Confine Routes and Orders to geographic boundaries using codes, and view on the map as polygons.
- Corresponding Assets in the Truck File have the same Boundary Codes (SpEQ code) ensuring the matched Orders are loaded on the appropriate Asset. However;
    - **Boundary code logic does not supersede standard EQcodes** when creating Routes. If matching EQcodes are detected, the orders may be sent to a truck with a matching EQcode rather than the applied boundary codes.
    - Boundary files can be applied in the Route Building Wizard or from the *Route Optimization* window. The boundary codes are applied in-flight as the Routes are built, but are not added to the order's EQcode field.
- When Orders fall in an area where boundaries overlap, the system applies multiple boundary codes to the Orders.
    - The Routing algorithm loads the Order on any Route with one matching boundary code, or changes the Route selection when volume flexes in the overlapping Boundary.
- Control daily disruptions to meet your organization's tolerance levels.
    - Run the same Driver and Assets in the same areas every day with little or no variations to their Routes.
- When a Boundary file is uploaded, it is added to a sortable Boundary file list. Click on the Boundary file to view the orders and customers that are using the boundary file.
- Boundaries are disabled when Remote Redispatch points are used. Boundaries are not compatible.

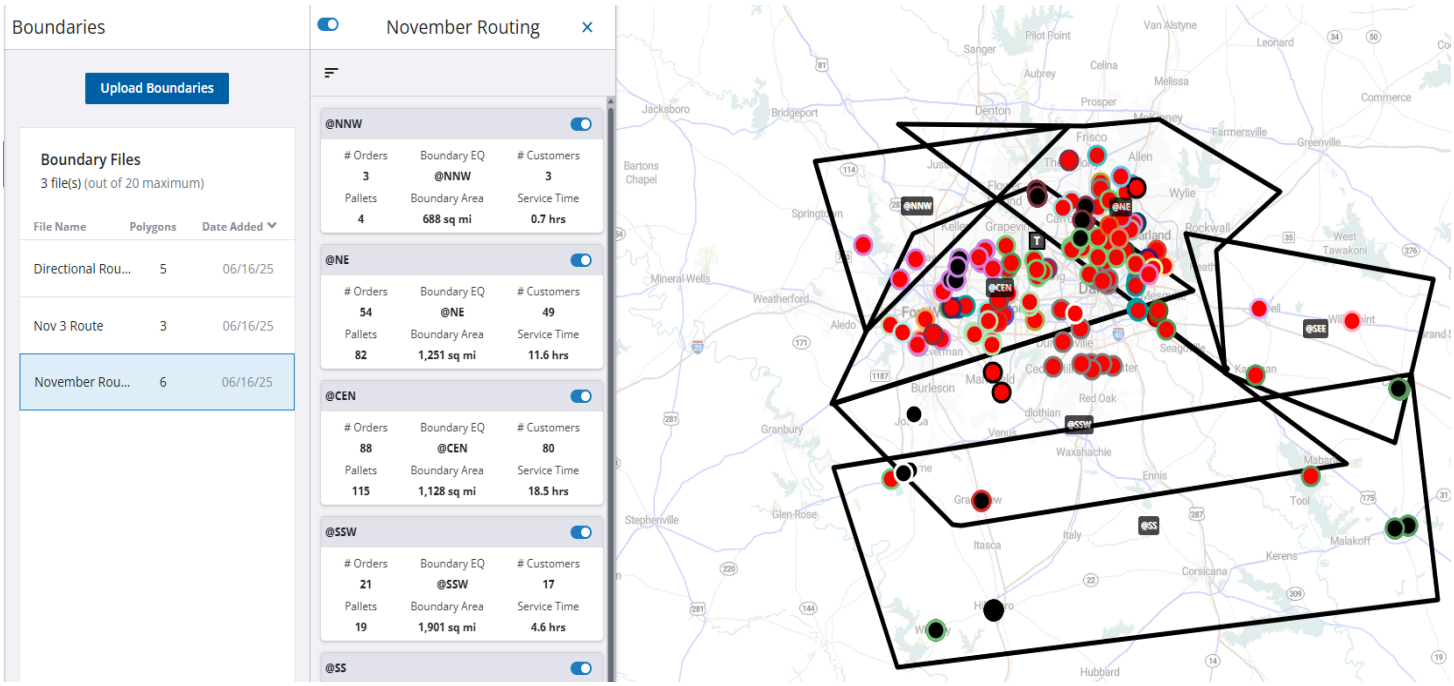

Figure 105 - Boundaries Page showing 8 boundary cards and their corresponding polygons on the map.

Create a Boundary File

For assistance creating an ADP Boundary File, reach out to your implementation team.

Upload Boundary Files

1. Open the Boundaries page.
2. Click on the *Upload Boundaries* button, and select the boundary file.

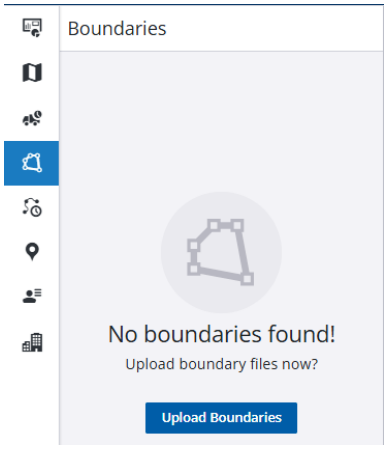

Figure 106 - Upload Boundary Files

Fixed Routes

The Fixed Routes page is structured the same as the Route Planning page and behaves in similar ways with some minor exceptions to reduce the likelihood of a Fixed Route being modified unintentionally. There is a sortable, filterable, and customizable Fixed Route list, Stop list, and Unloaded Orders list, as well as a map panel (See the Route Planning section for page and component details). A notable difference is the Branch Date Picker — in Fixed Routes, users select the Branch, Truck Profile, and specific weeks and/ or days rather than a start, end, or span range.

This section focuses on three different Route types: Fixed Routes, Cloned Routes, and Predefined Routes.

Fixed Route Toolbar

The Fixed Route page toolbars provide much of the same functionality as dynamic routing. Find instructions for these actions in the Route Planning Section — Create an Empty Route, Card Layout Editor, sort, and filter. Each panel also has a More Menu for additional multi- and individual Route/ Stop / Order actions. Follow the links below for details.

Multi-Route actions:

- Unload
- Unload & Delete
- Optimize Route
- Optimize Sequence
- Fix Start Times
- Float Start Times
- Reschedule Routes

Individual Route actions:

- Delete Route
- Invert Route
- Optimize Sequence
- Reschedule Route
- Show Stop Summary
- Show Truck Info
- Unload Route

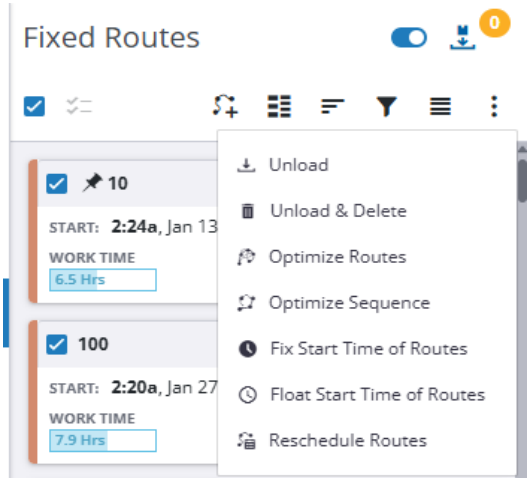

Figure 107 - Fixed Route Multi- Route More Menu

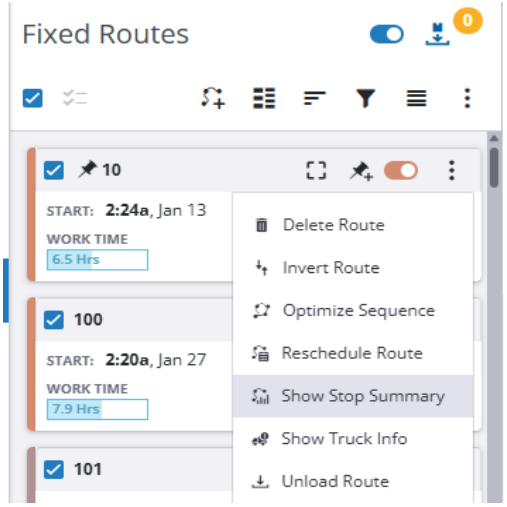

Figure 108 - Fixed Route Individual Route More Menu

Cloned Routes

Most Fixed Routes are stored in Appian Daily Planner and DRTrack, and can be cloned, creating daily Routes.

- Cloned Routes contain expected Orders (that may be placed). They are identified by a blue E badge on the card and outlined in red on the map.
  - Click on the red outlined Stop for details. Expected and Consolidated Orders also display an E on the map card.

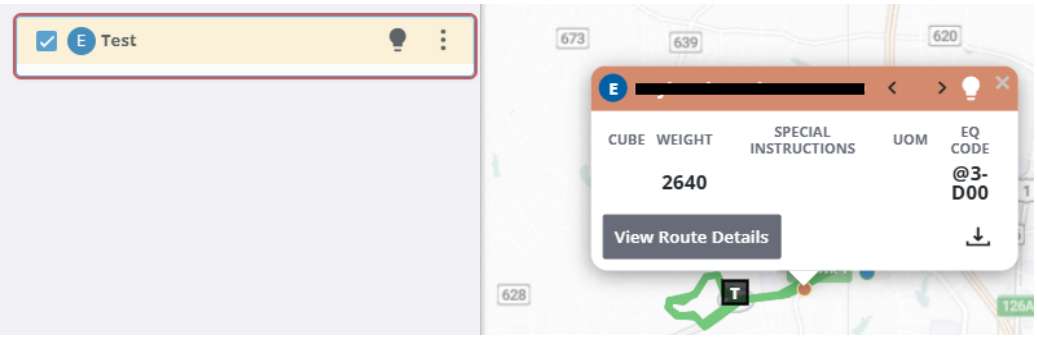

Figure 109 - Expected Order Stop details on the map

- Routes with Expected Orders have an *Expected* number displayed. Hover over the number to see different amounts.

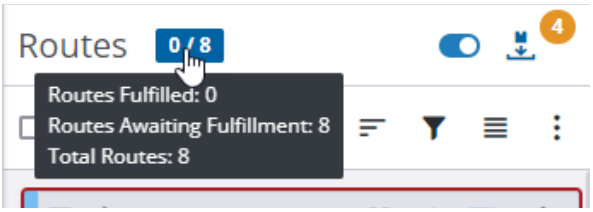

Figure 110- Routes awaiting fulfillment

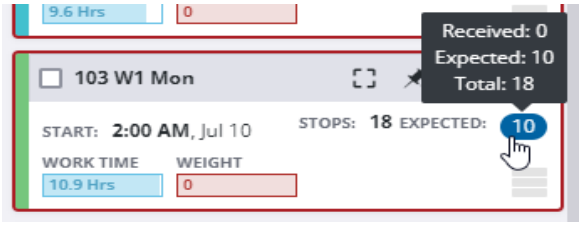

Figure 111 - Expected orders for the Stop

- When the actual Orders, from an ERP, are sent into Appian, the expected Orders are replaced, and the impact of the actual daily Order volume on the plan is changed.
- The Route card has a red outline when there are no filled Orders for that Route.

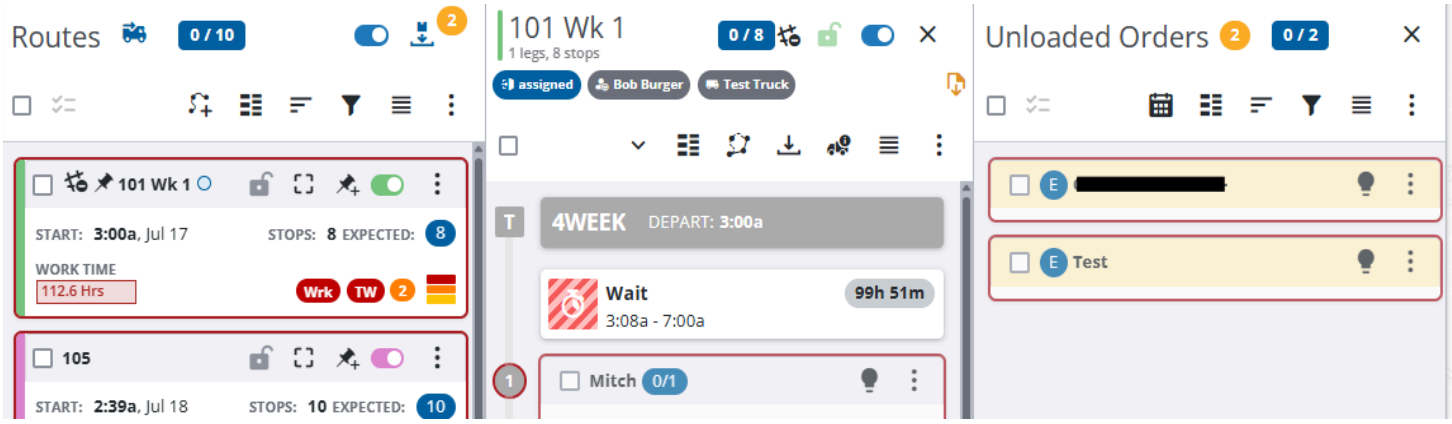

Figure 112 - Shows the Order, Stop, and Route card with no filled Orders

Predefined Routes

Fixed Routes are occasionally stored in an ERP system rather than Appian software, but the fleet may want ADP to adhere to a Route plan, rather than build a Route from scratch. This works for Routes that have been previously created or will be created with the Route-Building Wizard. It works this way:

The fleet passes values with the Orders so those Routes can be created.

FixedRT Value

1. Toggle on the *FixedRT* Stop User field for the Route the Order will be placed on (see Alias Settings).
2. The Order's FixedRt value corresponds to a Truck ID (Truck name) value that matches, and that Order is placed on that matching Asset.

FixedSeq Value

1. Toggle on the FixedSeq Stop User field for the Route the Order will be placed on (see Alias Settings).
2. Apply sequences to specific Routes (single or multi-Route option).
3. The Stops in the Route are sequenced according to the FixedSeq values associated with those Orders.

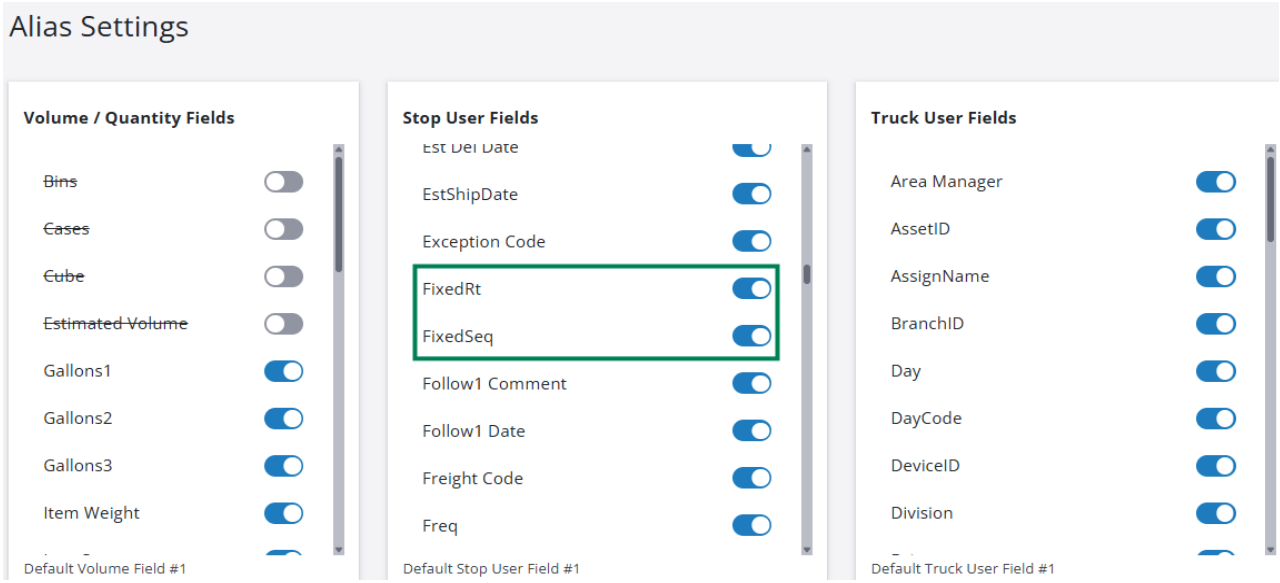

Figure 113 - FixedRT Value and FixedSeq Value in the Stop User Fields of the Alias Settings

Apply Fixed Sequence & Optimize

Routes containing Orders with Fixed Route fields are resequenced according to the sequence rules set in the ERP or Stop files. You can apply this to single or multi-Routes, but the option only appears when Routes have FixedRt values.

- Access the *Apply Fixed Sequence and Optimize* action on the Route card More Menu (Individual Route), Fixed Route page More Menu (multi-Route), or in the Route Details More Menu.

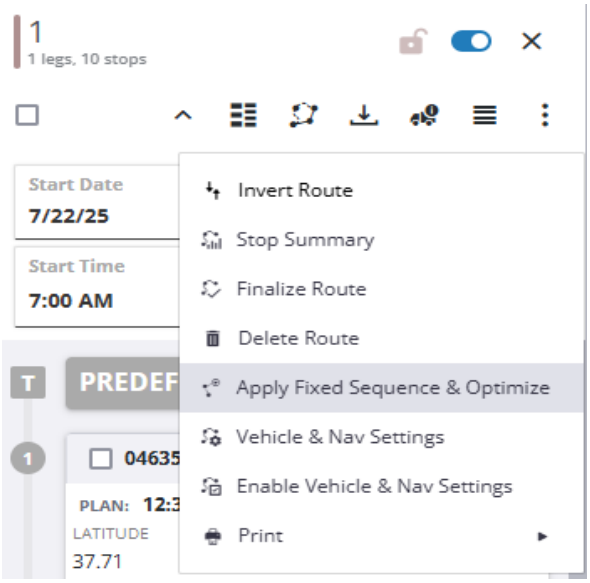

Figure 114 - Fixed Route More menu with *Apply Fixed Sequence & Optimize*

The system resequences the Orders according to the following rules:

- Sequences the selected Routes according to the FixedRt and FixedSeq fields associated with the Orders.
- If a Route has a combination of Orders with / without FixedRt and FixedSeq identifiers, it applies the Fixed sequencing logic to applicable Orders, and then fits in non-sequenced Orders according to the algorithm.
- If the Order contains a fixed sequence (FixedSeq), but not a fixed Route (FixedRt) value, the fixed sequence is ignored. The Order is placed in the best sequence possible according to the algorithm.
- If a Route contains multiple Orders with the same fixed sequence, it prioritizes Orders that were sequenced first, then fits in the other Orders with overlapping sequences. It tries to maintain the original sequences with little interference.

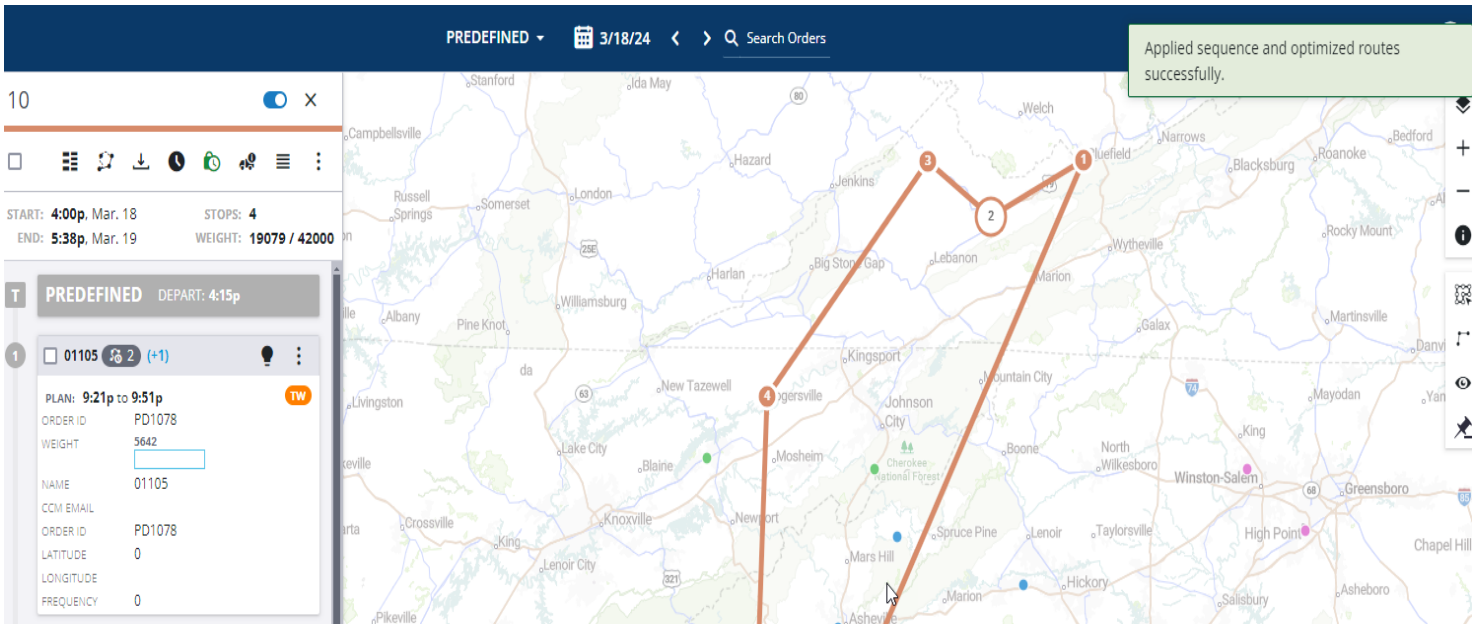

Figure 115 - Predefined Route badge displayed in the Route list

Badges and Visibility

Fixed Route Orders are identified by badges in the card view and highlighting in grid view. If these Routes have pre-assignments, it is also reflected on the card. The TruckID, FixedRT and FixedSeq and frequency fields can also be added to the Route Cards and Grid Layout. See instructions below.

Card View

- Orders with FixedRT display a gray badge with the TruckID and sequence number on Unloaded Orders. Once the Order is loaded, the badge only shows the sequence number in the Route Details card view.
  - If the FixedSeq value associated with the Order is non-numeric, it will not appear in the badge.
- Fixed Routes with preassigned Drivers and Devices have a color-coded dot next to the Route name on the Route card. Hover over the dot to view the Driver and Device assigned to the Route (see Dispatch Assignment Table).

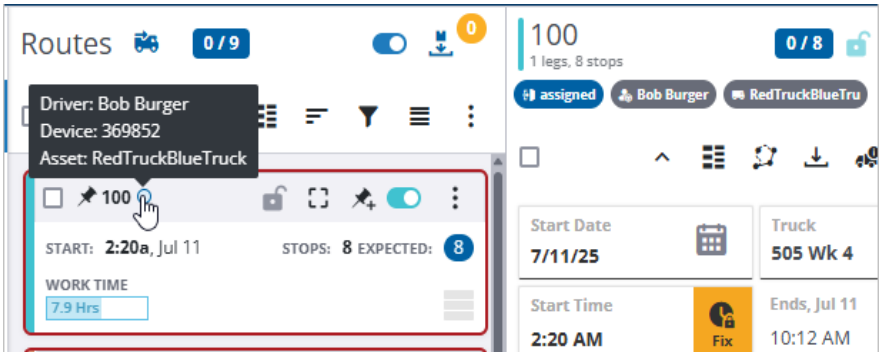

Figure 116 - Route with a pre-assigned Driver and device (blue)

Example: Add FixedRt / FixSeq

1. Click on the Card Editor button in that **Route**'s Toolbar. See Route Card Layout Editor for additional instructions.
2. Navigate to the *Fields* section on the left, and scroll down to the *User Fields*.
3. Select FixedRT and/ or FixedSeq and move it to the Layout card in the center.

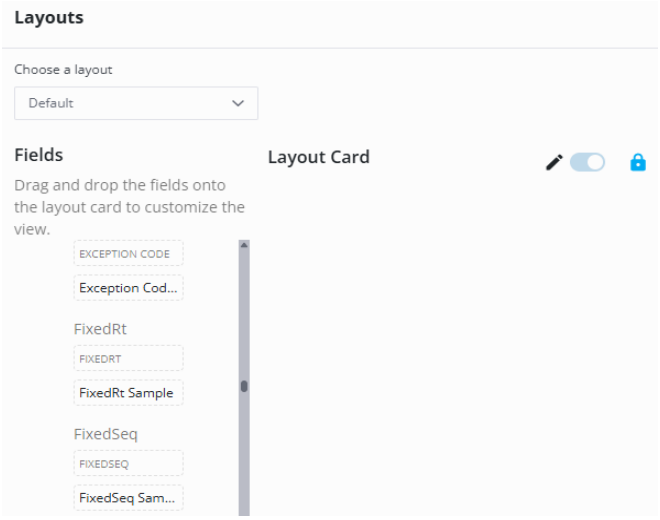

Figure 117 - FixedRT and FixSeq options in the User Fields

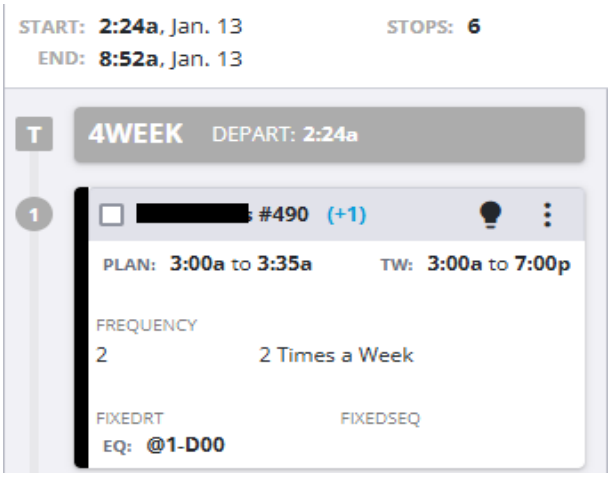

Figure 118 - Card with the RT, SEQ, and Frequency fields

Grid View

Example: Add Truck ID

1. Scroll to the right in **Route** Grid view, and click on the Configuration button in the top right.
2. Scroll down to *User Fields* and select *Truck ID* from the list to add that column to the grid.

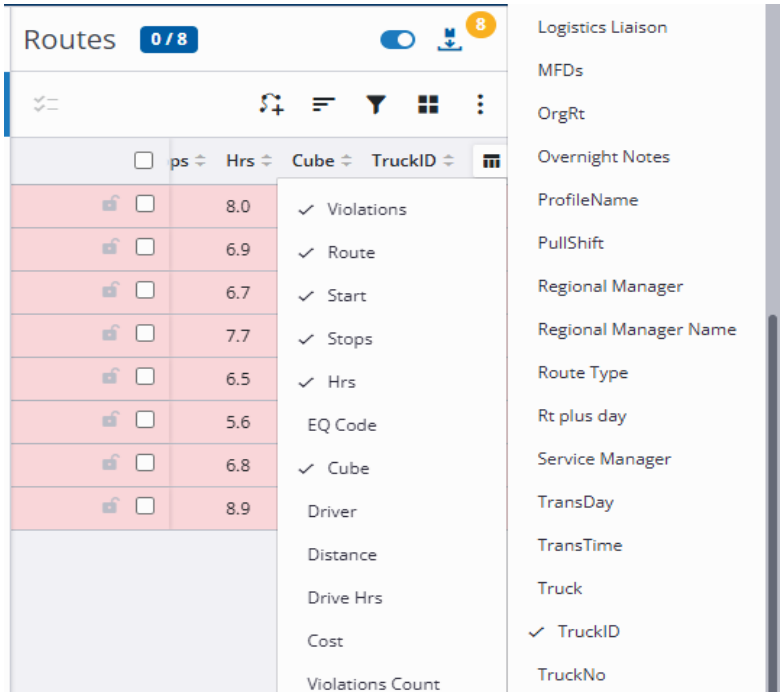

Figure 119 - Route Grid view with Truck ID selected

Points of Interest (POI)

Use the POI feature to identify and save geolocations in a library. These POIs are used in the same manner as a valid address when assigning and routing Orders in DRTrack. POIs are useful for deliveries to locations without an established address (e.g., new construction), rural locations, or offsite deliveries. If you manually geocode many Orders, setting POIs can be a time saver.

Create a POI

Create a new Point of Interest.

1. Double-click anywhere on the map, or Right-click and select *New POI*.
2. Move the pin to ensure the Latitude and Longitude are correct.
   - Use the satellite view found under Map Style (top right corner of the map panel) for fine-tuning.
3. Enter the name, notes, and type (commercial or residential) into the *Create New Point of Interest* window.
   - Each POI should have a unique name.

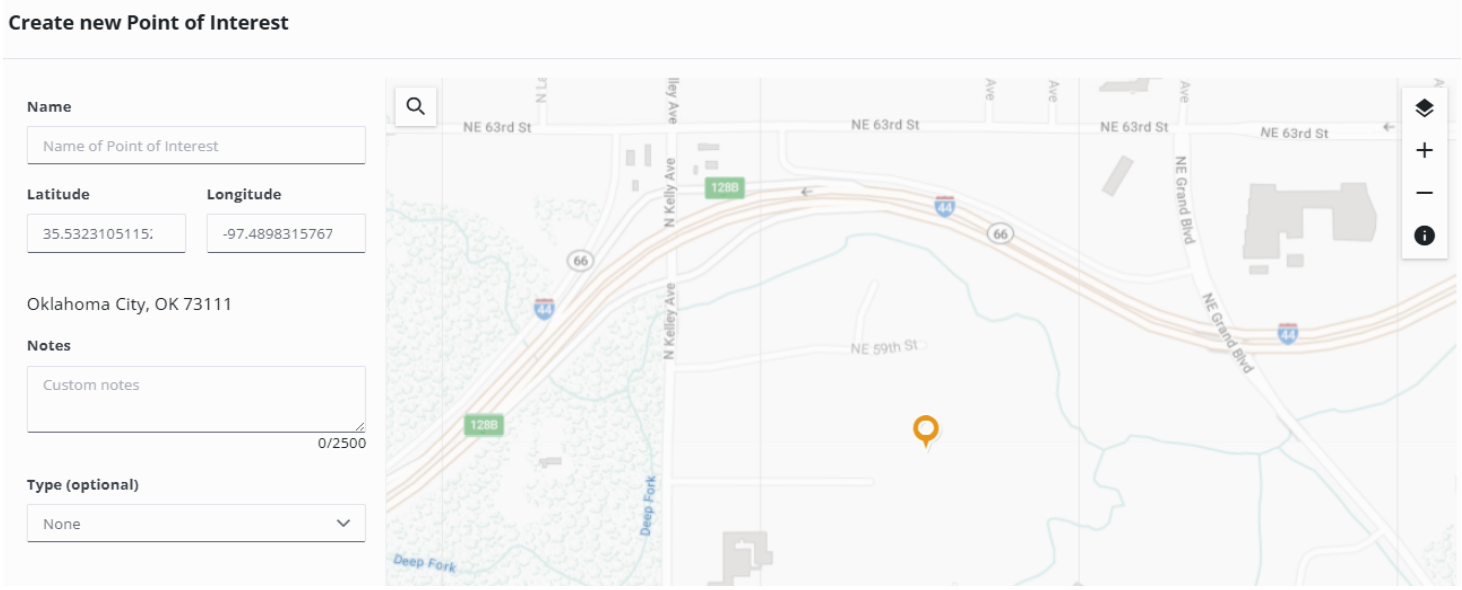

Figure 120 - Create POI Window

4. Click on the *Create* button (at the bottom) to finish and display the POI card in the left panel and on the map.
   - The POI can now be assigned.
   - Selecting a pin on the map displays the same POI card on the map panel.

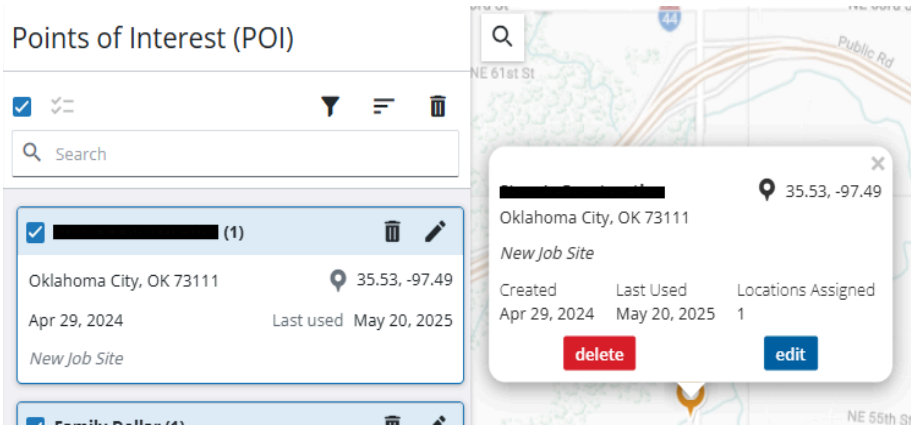

Figure 121 - POI card list after creation and POI on the map

Edit a POI

Update POI details at any time to maintain a full, accurate library.

1. Use the search, filter, and sort options on the Points of Interest page to locate the POI that requires edits.
2. Click on the pencil icon (top right corner of the POI card), or click on the card and select the edit button on the map.
3. Edit the details that need updates, and click on the *Save* button to finish.

Delete a POI

1. Use the search, filter, and sort options on the Points of Interest page to locate the POI(s) that require deletion.
2. Click on the trashcan on the POI card to delete one POI at a time, or click on the trachcan in the POI panel toolbar to do a batch deletion.
3. Click on the *Yes* button on the confirmation window to delete the POI.

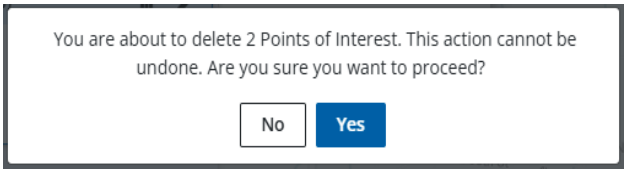

Figure 122 - Delete POI confirmation request

Search POIs

Click on the Search bar and enter the key word. Search POIs by name, address, city, state, ZIP code, and notes.

Filter POIs

POI filter options are used in a few different ways to render the best results:

1. Click on the funnel icon to filter POIs by Last Used Date in descending order, or
2. Click on the funnel icon then select Filters to use advanced filter options (See Filter Routes for additional details).
3. Click on the Configuration button to customize columns for additional filter and sort options.

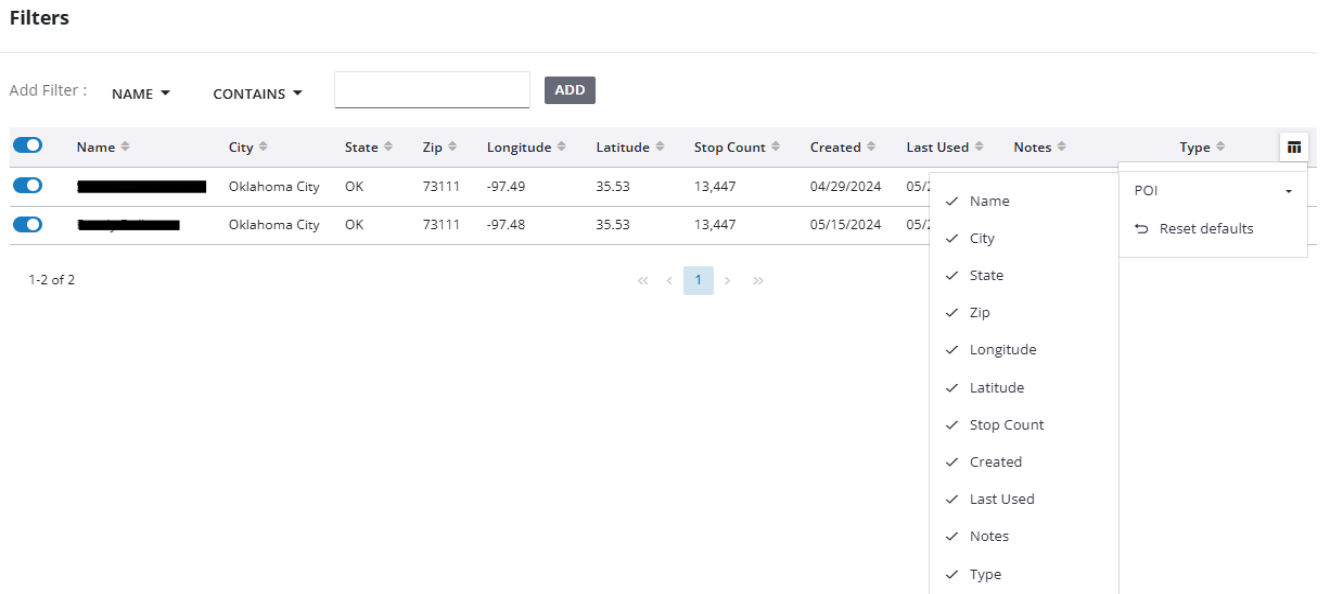

Figure 123 - Filter POI options and the configuration menu to add more filter options

Show Bad Georesults

The Show Bad Georesults filter on the Unloaded Orders panel is based on the BadGeoresultstoHighlight setting in DRTrack. It allows the user to filter Orders with bad georesults to help make POI assigning easier. This setting is adjusted in DRT's Configuration Manager under Badgeo (See the DRTrack User Guide for instructions).

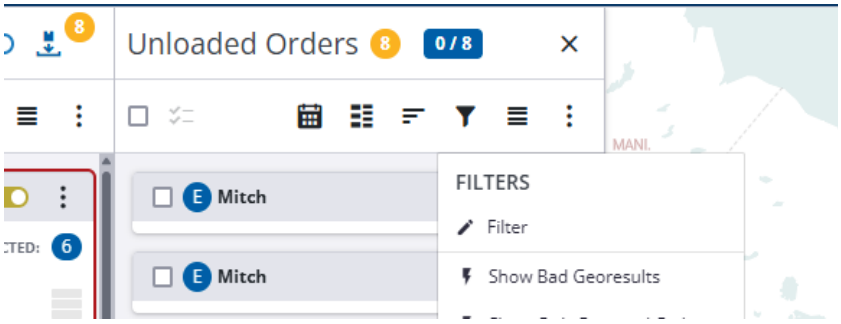

Figure 124 - Show bad Georesults Filter option in the Unloaded Orders card

Sort POIs

Sort by any POI field. Click on *Reset to Default* to clear sorting.

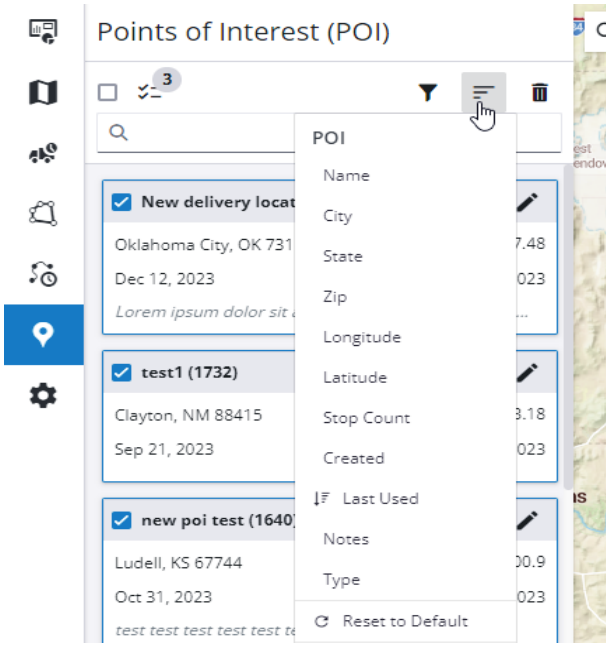

Figure 125 - POI Sorting options

POI More Menu

The More menu on the POI page behaves the same way as the More menu on other pages, and the Geocode, Order Details, and Duplicate Orders actions are explained in the Route planning section.

Assign POIs

POIs can be assigned individually or through a multi-Route action on the Route Planning page.

1. Click on the Unloaded Orders icon in the toolbar.
2. Determine if you want to assign the POI to one or to multiple unloaded Orders, and click on the proper More Menu.
3. Select Assign POI from the More menu.
4. Select the desired POI from the library, and click on the *Assign* button to finish.

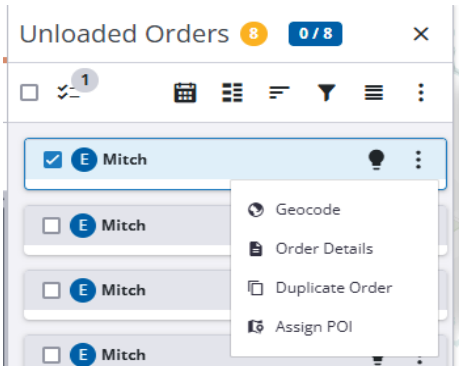

Figure 126 - Unloaded Order card More menu

6. Confirm the POI is assigned with the confirmation message in the top right corner.

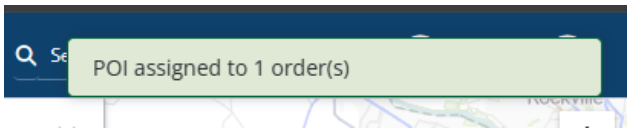

Figure 127 - POI assignment Confirmation message

Accounts

The Accounts page allows permissioned users the ability to view and modify customer accounts. Accounts are managed in a customizable, expandable table based on the Branch selected in the Daily Planner.

1. Click on the hamburger button (three lines) in the top left corner.
2. Scroll down to Accounts.
3. Customize the table. Configurations are saved locally per user and browser.
   a. Click on the Configuration button in the top right of the Accounts table to add or remove rows and reset defaults.
   b. Click on the Column headers and drag them into the desired order.
   c. Change the pagination value in the bottom left. It is defaulted to 50 results per page.

Account Actions

1. Create Accounts
2. Sort, filter, and search Accounts.
3. Click on any row in the table to view Account information and take additional actions.
   a. Navigate to different topics using the side navigation — Contacts, Delivery Time Windows, and Fixed Routes.
   b. Click on the More Menu to complete one of the following actions — Geocode, Duplicate Account, or Set account as the Primary.

Create Accounts

Create an account to manage your customer items such as billing and shipping addresses and other contact information.

1. Click on the *Create Account* icon or right click anywhere on the map.
2. Enter the customer information (User information can be edited at any time).
   - Account Name and ID are required. More information provides a better Route planning experience.
3. Check the *Remote Redispatch Location* box if you wish to designate the account as a Remote Redispatch location during Route building.
4. Enter the customer's street information and select the suggested address, if one is available, or use the *Latitude and Longitude* button and move the pin to the approximate location on the map.

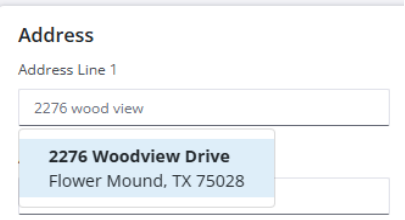

Figure 128 - Customer's street address and the suggested location

5. Click on the Geocode button for exact longitude and latitude coordinates.
   - Re-activate the *Geocode* button by either changing the address or by clicking the *Latitude Longitude* button.
6. Click on the provided coordinates to zoom to the location on the map.
7. Click on *Create* at the bottom to finish the account set up.

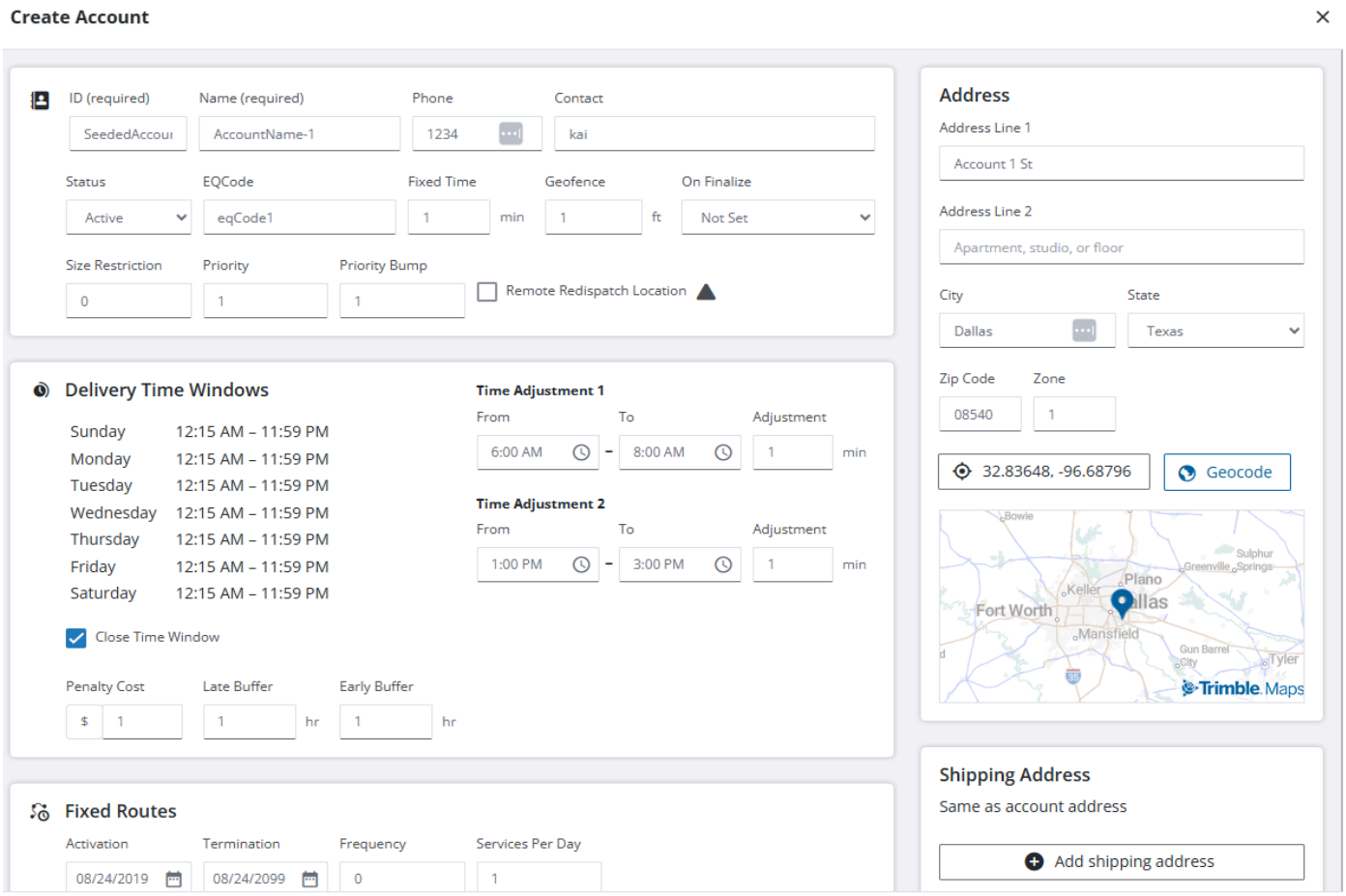

Figure 129 - Create and Account window

Primary Accounts

Primary Accounts are pre-filled templates. Administrators can set up Primary Accounts per customer/company (not per Branch) to auto-fill content when creating a new account. Primary Accounts are not required.

1. Hover over the Account that you want to identify as the Primary Account.
2. Click on the More Menu (three dots), and select *Set as Primary*.
   - Primary accounts are identified by the Primary label next to the account name.
   - Follow the same steps to unset the account as the Primary.

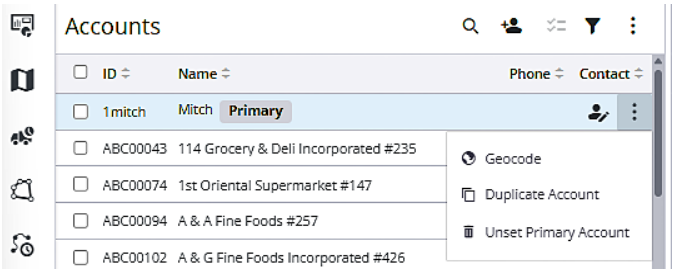

Figure 130 - An example of an account set as Primary

Edit Accounts

Edit accounts directly from the Accounts table or from the Account view.

1. Edit from one of the following options:
   a. **Account Table** — Hover over an account to display the Edit and More Menu Actions then click on the Edit icon.
   b. **Account View** — Open any Account from the Account Table then click the edit pencil in the top menu bar.

Figure 131 - Account table view edition option

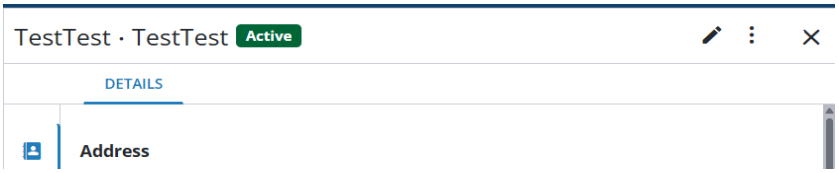

Figure 132 - Account View editing option

2. Make the necessary changes.
3. Fine-tune the latitude and longitude of an existing Account using the last known Stop as a reference.
4. Click on *Save*.

Sort and Filter Accounts

Filter the table by Account Status (Active, Inactive, Hold) and sort each column in ascending or descending order by clicking on the column header (ID, Name, address, etc).

Search Accounts

Use the search bar located in the Toolbar to search Accounts by ID, Name, Address, or City.

Accounts Map

The Accounts map displays pins for all current Accounts by page.

1. Click on a pin from the map to scroll to the coordinating Account in the table.
   - Green Pins — Active Account
   - Yellow Pins — Account on Hold
   - Grey Pins — Account is Inactive

2. Navigate to another page in the table to refresh the map to show additional accounts.
3. Right click anywhere on the map to use the *Create Account* action. See Create Accounts for instructions.
    - The map completes a reverse GeoCode and enters the address data into the new account.
    - The Geocode overrides the Primary Account address, if one was established.

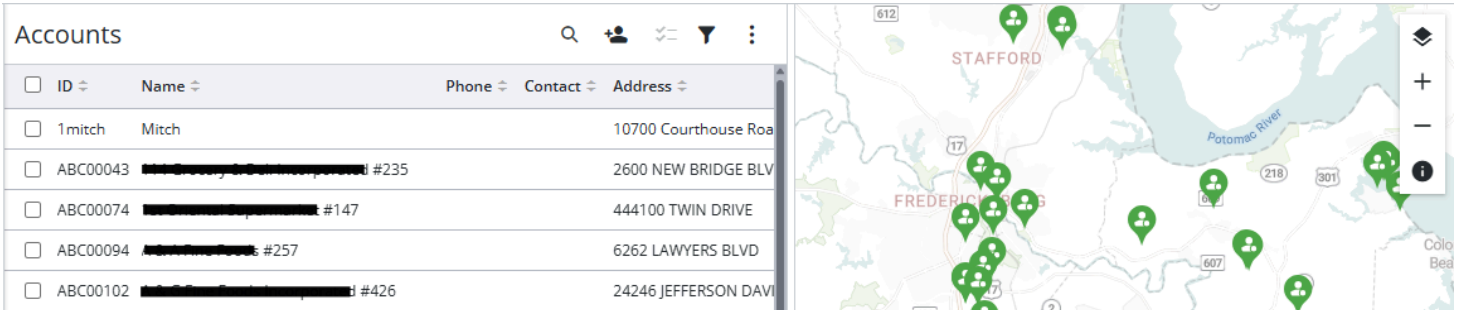

Figure 133 - An example of an Accounts map with sensitive information redacted

Account Shipping Addresses

Shipping Addresses (also known as Ship-tos) can be used in place of the original account address for routing purposes. An account can have multiple shipping addresses to accommodate all of their locations.

Add Shipping Address

If the account does not have a separate shipping address, it defaults to the Account address, but a shipping address can be added at any time.

1. Navigate to the desired Account in the table as if you were going to edit it.
2. Click on the *Add shipping address* button.
3. Enter the new shipping address and Geocode it, if necessary (see Created Accounts for instructions).

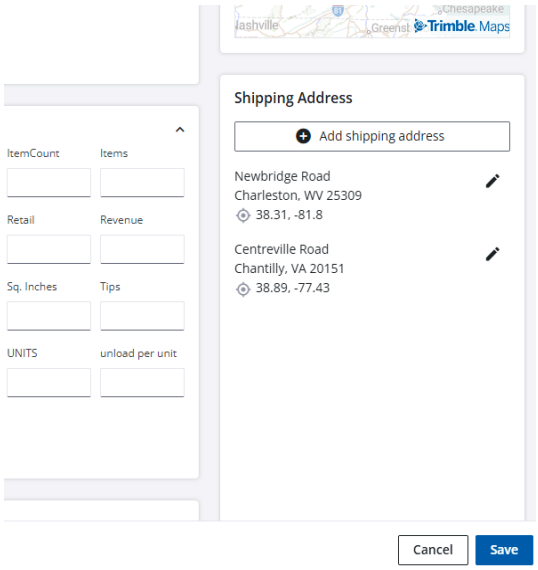

Figure 134 - Add a shipping address button

4. Click on *Save* to populate the shipping address in the Account table.

To view the Shipping address cards:

1. Click on the desired Account in the table to navigate to the Account Details page.
2. Click *View all* next to *Shipping Address* to see the full list associated with the account.

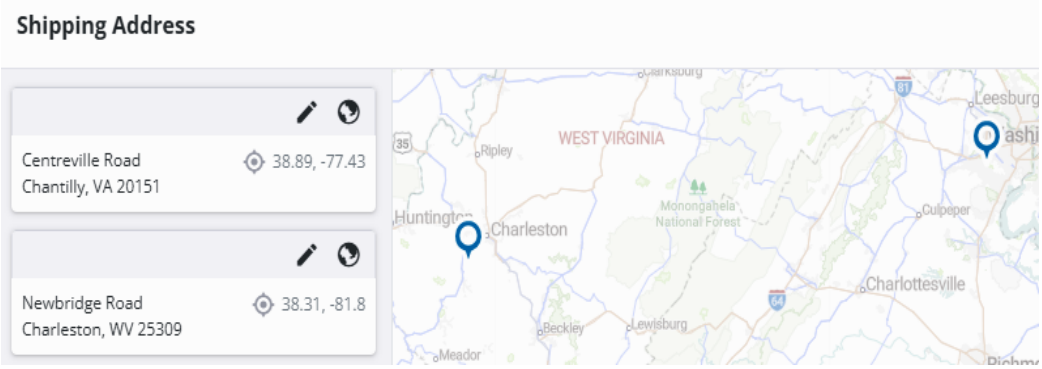

Figure 135 - Shipping Address list for an account

Delivery Time Windows

Delivery Time Windows establish acceptable timeframes for Order deliveries for each account and shipping address.

Add Delivery Windows

1. Click on the edit pencil in the top toolbar of the Account.
2. Click on the *Select Time Windows* button to open *Select Time Windows*.
3. Select the days of the week and time by clicking each of the fields and selecting those values.
4. Click on the *Add More* button to enter multiple delivery windows.
5. Click on *Done* to save the selections and populate the Delivery Time Window section of the Account.
   - Click anywhere on the existing Time Windows to reopen for edits.
   - Click on the trash can icon next to the time window to delete the delivery window.

Figure 136 - Adding delivery time windows for the specified account

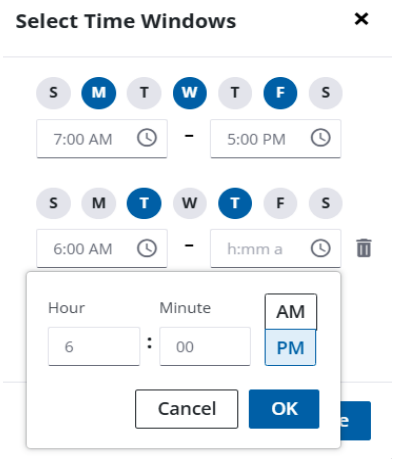

Figure 137 - Time and day editing window

Fixed Routes (Accounts)

Fix a Route for customers with repetitive, scheduled daily Routes.

1. Click on the edit pencil in the top toolbar of the Account.
2. Enter the Activation and Termination dates for the limited delivery window.
3. Enter the number of times (frequency) a delivery can be completed per day in the window selected.

In the example below, the customer is allowing one delivery a day for each day in the month of May.

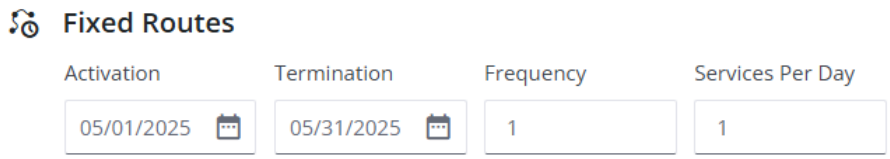

Figure 138 - Fixed Route frequency settings

User and Quantity Fields

Quantity and User fields are dynamically populated according to your global *Alias* settings in Preferences. Adjust these settings per account to customize Routing.

1. Click on the edit pencil in the top toolbar of the Account.
2. Enter Account-specific Quantity and User values.

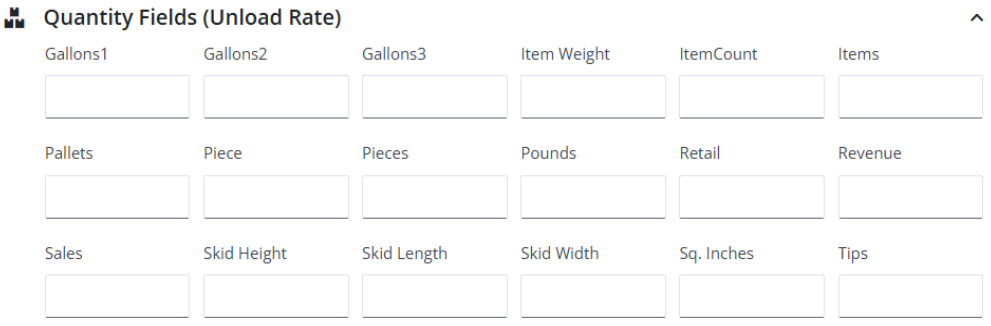

Figure 139 - Quantity value settings

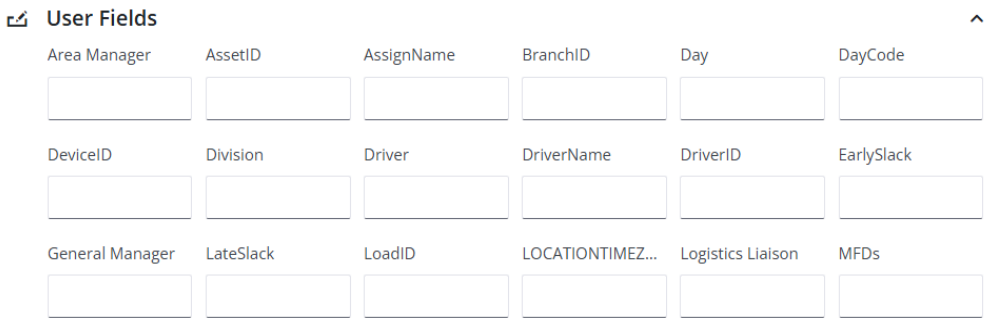

Figure 140 - User value settings

Permissions

Permissions are set in DRTrack and shared with Daily Planner. Use the table to determine permissions requirements.

PERMISSIONS	ACTIONS ENABLED
ACCOUNTS	
Create Accounts	Create a new Customer Account
View Accounts	● View customer accounts ● Accounts page is hidden if not enabled
Modify Accounts	Edit customer accounts
Administrator	● All Account actions ● Set Accounts as Primary
ROUTING	
View Routes	● View Routes located on the Route planning page and on the Map by Day or Week ● View all Scheduled Time Blocks in Day and Week View; Reservations, Maintenance and PTO ● Use View Routes Details option on the Route card and edit corresponding DRTrack page
Create Routes	● Create Routes via the Route Calendar by dragging and dropping from Unloaded Orders panel ● Create Routes via the Lasso Tool on the Map (Lasso is hidden when not enabled).
Modify Routes	Can complete the following for Routes already created on the Route Calendar and on the Map: ● Change Start Time and Date ● Change Assigned Assets and Drivers ● Add and/ or remove Orders ● Use the Optimize Route option (option is hidden when not enabled).
Delete Routes	Use the *Unload Route* option from the Route card dropdown (option is hidden when not enabled).
Manage Trucks	● Use *View Truck Info* option on the Route card dropdown and edit corresponding DRTrack page ● Schedule Maintenance blocks for Assets on the Route Calendar (option is hidden if not enabled). If not enabled: ● Cannot View Route Details (option is hidden) ● Cannot Print Route Details (option is hidden)
DISPATCH	
Export Routes	Use the Export icon on Route card and export routes
ORDERS	

View Orders	● Interact with the Unloaded Orders panel (option is hidden when not enabled). ● View Unloaded Orders in the Unloaded Orders panel and on the Map ● Use the POI Manager icon located on the Unloaded Orders panel ● If not enabled, user cannot Modify Orders
Modify Orders	● Use the More Menu located on each Unloaded Order card (option is hidden when not enabled). ● Access to the following options: Edit corresponding DRTrack page, Geocode, Duplicate Order
Create Appointments	● Create Reservations on both the Asset and Driver views ● PTO is not affected by this Permission; user can still create PTO blocks
Modify Existing Appointments	Use the Edit option on existing Reservations to modify the following: ● Notes ● Start/ End Date and Time ● Assigned Asset and Driver
Delete Appointments	Use the Delete option on existing Reservations
DRIVERS	
View Drivers	Create PTO blocks for Drivers
SITE	
An Administrator	Interact with the Preferences tab (option is hidden when not enabled): ● User can change Aliases ● User can set Violation parameters ● User can set Calendar Start Time and Business Hours/ Days
BRANCHES and DISPATCH GROUPS	
View Branches	● View the Organization & Management landing page and sidebar menu ● View the Branches & Dispatch Group tiles. ● See all Branches and Dispatch Groups on the page ● Cannot manage Branches and Dispatch groups if not enabled
Create Branches	● View the **+ sign** to add a new Branch or Dispatch group on the Branches and Dispatch panes. ● Cannot modify or delete Branch and Dispatch groups if not enabled.
Modify Branches	● See the **pencil icon** next to each Branch ● Click on a Dispatch group name to edit ● Cannot delete a Branch or Dispatch group if not enabled.
Delete Branches	See the **trash can icon** next to each Branch name or Dispatch group and be able to delete it.

Preferences

The Preferences page provides five different areas to set Branch and global rules for Route planning. Everything from violations, algorithm settings, and business rules are managed here.

- Prescriptive Intelligence — Establishes violation priorities
- Business Rules — Sets Time and Calendar behaviors for Routing
- Aliases — Sets standards for Volume/ Quantity, Stop Users, and Truck Users
- Algorithm — Tweaks the way the Algorithm behaves
- Behaviors — Adjusts Routing preferences like Auto Reschedule, Delivery Date Ranges, and Truck Reuse.

Prescriptive Intelligence

Establish the priority level for each violation type, from not important to critical. Each priority level determines how Resource Calendar displays and/or sorts violations on the Routes Panel.

- Violations appear on the Route or Stop card when a route is pinned, depending on what the violation directly affects.
- Violations appear as color coded circles on these cards and Dispatch depending on the violation and its priority.
  - Not important — white circle
  - Important — grey circle
  - Very Important — orange circle
  - Critical — red circle

Violation	Route Card	Stop Card	Dispatch	Dashboard
Cap (Capacity) — Truck capacity has been exceeded	✔		✔	
CFLT (Scheduling Conflict) — Driver or Asset has a period of time overlapping multiple Routes. To resolve, reassign or reschedule.			✔	
Dist (Max Distance) — Max distance for the truck has been exceeded	✔		✔	
DM (Delay Minute) — The Stop-level warning shows how many minutes the Stop is late based on actuals. The Route-level warning shows the last delayed Stop (non-cumulative). Displayed only as a number.	✔	✔	✔	✔
Drv (Drive Time) — Total allowed drive time for the Truck has been exceeded	✔		✔	
EQ (Equipment Code) — Assigned Truck and loaded Stop are incompatible		✔	✔	
Ret (Return Time) — The total trip time has been exceeded	✔		✔	
SEQ (Sequence) — Sequence code entered was not followed		✔	✔	
TW (Time Window) — Delivery is expected outside of the allowed times for the stop		✔	✔	
Wrk (Work Time) — Set work time has been exceeded	✔		✔	

Statistics are displayed on the Unloaded Orders and Solution Comparison panes within the Solution Statistics panel.

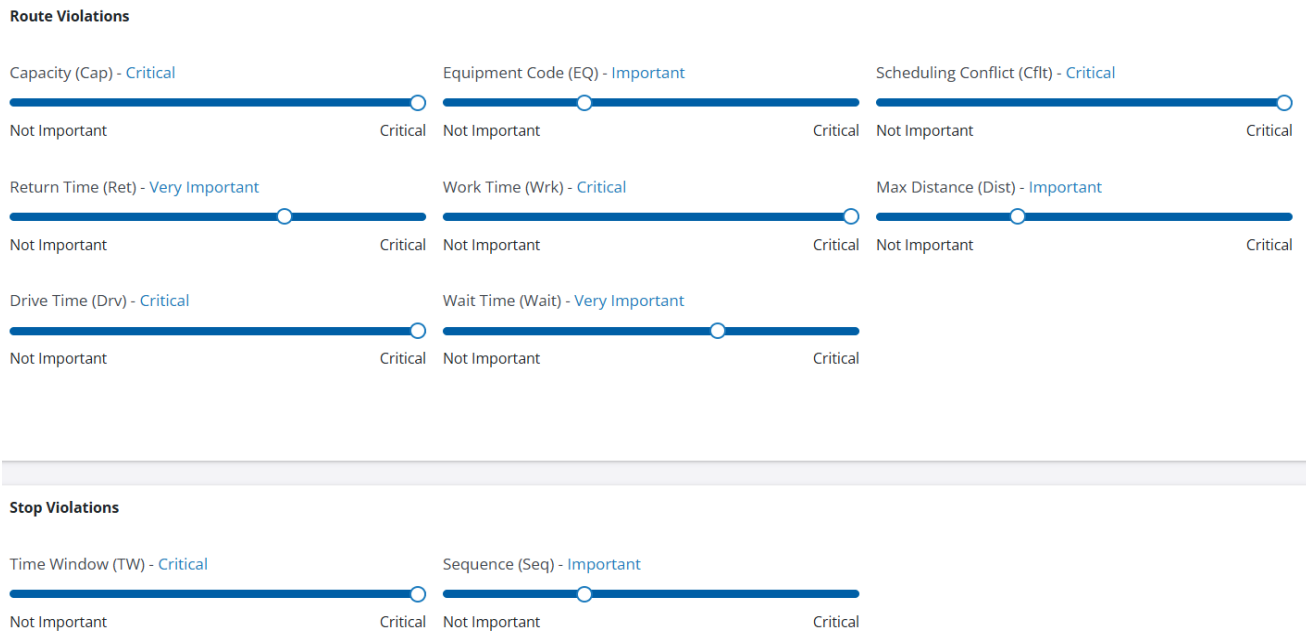

Figure 141 - Violation Settings under Prescriptive Intelligence

Business Rules

Business Rules set the time and calendar behaviors for each customer to ensure the algorithm creates Routes during the appropriate time windows. It also manages the date picker at the top of the ADP application.

Date Range Picker Default view — The date picker at the top of the application lets users select one or multiple dates for viewing and building Routes — Start, End or Span. Users can select their preferred default view:

- **Start** — Shows only the Routes with the start date selected
- **End** — Shows only the Roues that end with the date selected
- **Span** — Shows all the Routes that fall between the selected start and end date.

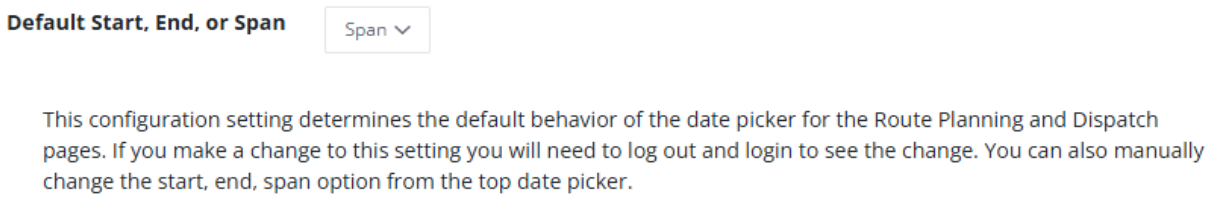

Figure 142 - Date picker view defaulted to Span

Auto Adjust Date Default — When an action is taken (e.g. Route rescheduled) that moves the Route outside of the range selected in the Date picker, users can select their preferred default response:

- **Toggled on** — The Date picker adjusts to show the Routes within the new date range created by the action.
- **Toggled off** — The Date picker does not adjust the dates and shows the changes in the Change Summary panel.

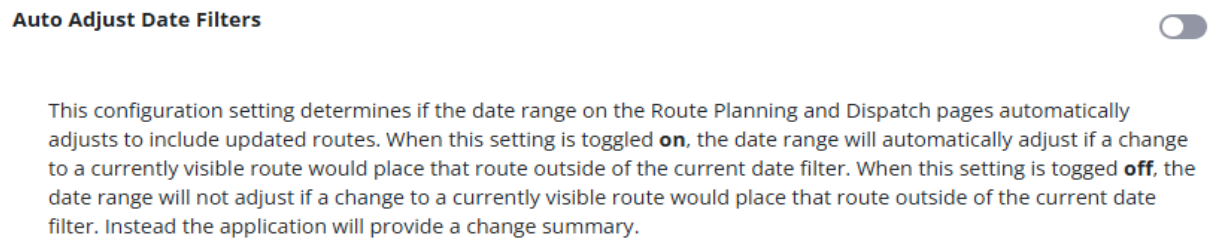

Figure 143 - Auto-adjust Toggled off

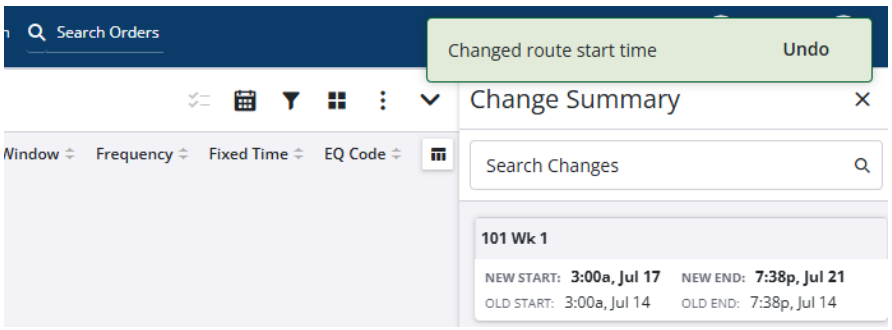

Figure 144 - Change Summary

Aliases

Aliases are commands such as a function, script, or executable that ADP completes based on settings created in DRTrack.

- When toggled on, they are shown in ADP.
- If they are not created in DRTrack, the field appears with a line through it in the ADP settings.

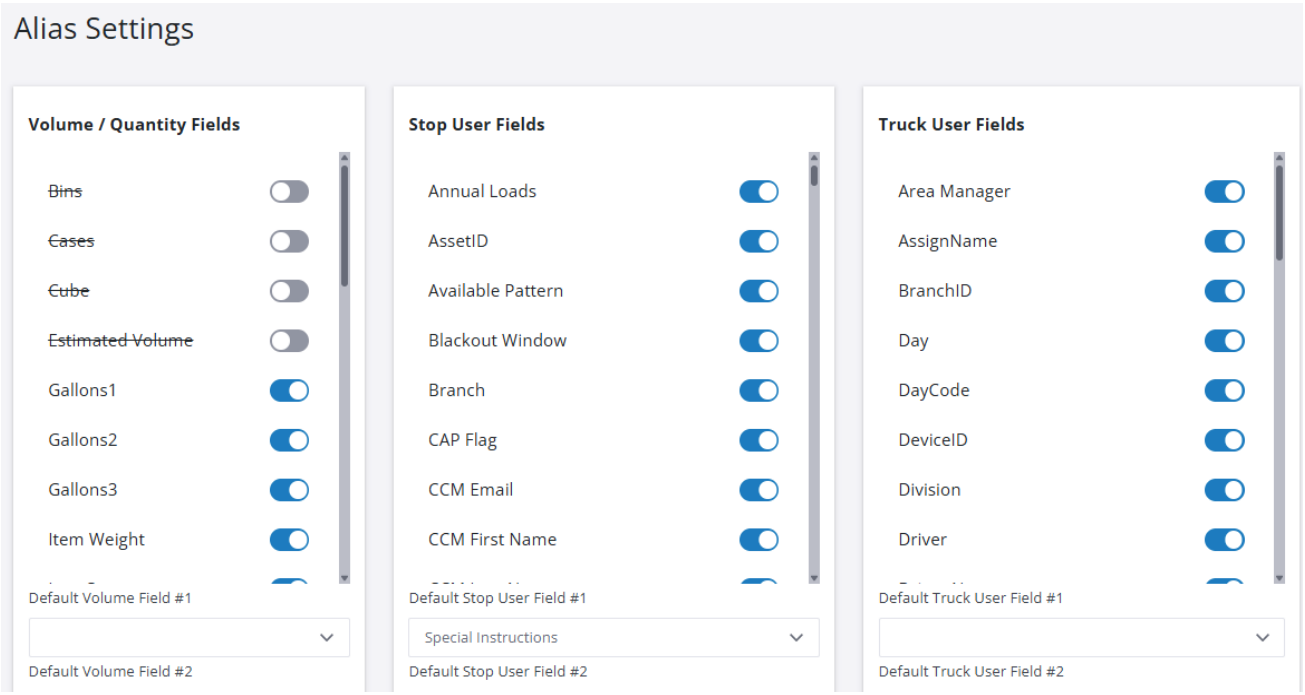

Figure 145 - Alias Settings on the Preferences page

This table shows where selected Aliases are displayed within ADP. Currently, Truck User Fields are not shown anywhere.

	Volume #1	Volume #2	Stop User #1	Stop User #2
Solution Statistics Unloaded Orders pane	✔	✔		
Unloaded Orders cards within Unloaded Orders page	✔			
Loaded / Unloaded Order Map popups	✔	✔	✔	✔
Boundary File cards in Boundary Tab	✔			

Algorithm

Configure the settings that govern how the Route-building and optimization algorithms function. Algorithm settings can be applied in Daily Planner (globally or per Branch), or imported from DirectRoute.

- Algorithm Settings applied are identified with a badge in the left navigation and the top Global and Branch buttons.
- Return to default at any time, but changes impact Routes based on how they were applied — globally or per Branch.

Use the left navigation to explore six different topics to allow for maximum customization. Each section describes the settings, how it impacts the algorithm and if there is a default:

- **Adjustments** — Sets values concerned with Asset speed, mileage, distance, rush hour, and turn time.
  - Use with *Straight Line* Distance calculations. Does not work with *Road Network* or *Approximate*. See Distance settings below.
- **Consolidation** — Sets preferences and exceptions for consolidating Orders, equipment codes, and fixed time.

  DRT Users:
  - Daily Planner is not affected by the Consolidation settings in the DirectRoute Algorithm section when imported. To ensure Consolidation works as expected, change the INI settings in DRTrack.
    1. Navigate to DRTrack either through direct login or through the Bento menu in the ADP toolbar.
    2. Click on *Admin* and select *Site*.
    3. Scroll to *Settings and Configuration*.
    4. Enter *Consolidate* in the search bar and click on the *Filter* button.
    5. Check the settings you want considered when consolidating — Account Address, AccountID, or FixTimes.
       - When all three are enabled, Orders within the same time window, EQ Code, Lat/ Long, earliest / latest date, and zone are consolidated, and the fixed times on all the Orders on the Stop are added together.

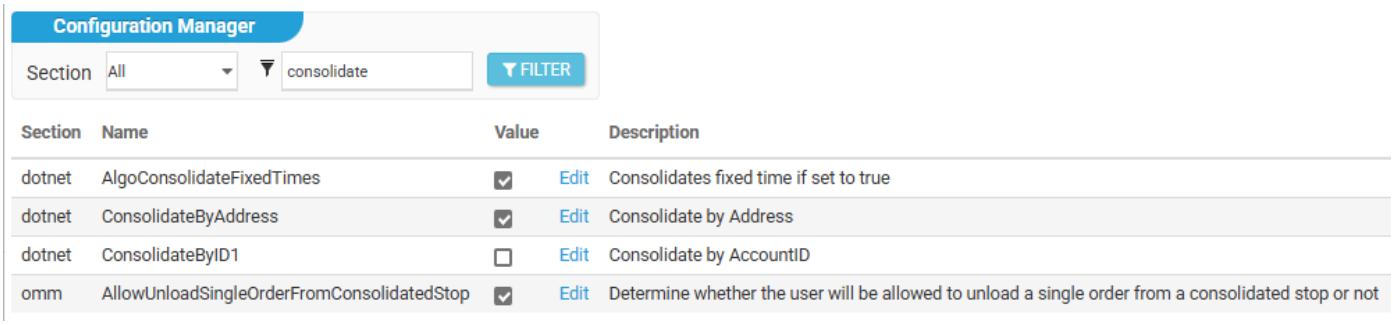

Figure 146 - Configuration Manager for Consolidated Orders

- **Constraints** — Sets distance and time between Stops, max wait times, number of Stops, and backhaul defaults
- **Distances** — Sets the distance calculations and vehicle & navigation (e.g., vehicle profiles) preferences.
    - This setting determines how the algorithm generates and uses distances and drive times to weigh the best options. If Routes are built or edited outside of Daily Planner, distances and drive times defaults to Straight Line calculations.
        1. Click on *Distances* in the left navigation (Preferences *Algorithm* tab).
        2. Determine how the algorithm generates and uses distances / drive times:
            a. **Straight Line** — (Default) Uses proprietary straight line formulas to approximate road distances and drive times.
            b. **Road Network** — (Recommended) Calls Trimble Maps service to generate commercial road distances and drive times based on the Asset profile selected. May impact solve times depending on the size of the solution.
                - Only Routes built and edited in Daily Planner can use Road Network calculations.
            c. **Approximate** — Uses the proprietary map to calculate drive times using commercial road distances.
        3. Select option in *Vehicle Profile and Region* for calculation — Required for *Road Network* or *Approximate.* For additional info, click here.
            - **EU Auto** — Passenger car
            - **EU Heavy Rigid** — Vehicle with special body arrangements and / or equipment (12m L x 2.55m W)
            - **EU Light Commercial** — Cargo or utility van (8m L x 2.4m W)
            - **EU Midsize** — Box truck, City Delivery truck, Bucket or Beverage truck (10m L x 2.55m W)
            - **North American Auto** — Passenger car
            - **North American Heavy (53')** — Tractor Trailer with a Single Trailer (53’ L x 102” W)
            - **North American Light Commercial** — Cargo or utility van (20’ L x 96” W)
            - **North American Midsize** — Box truck, City Delivery truck, Bucket or Beverage truck (26’ L x 96” W)

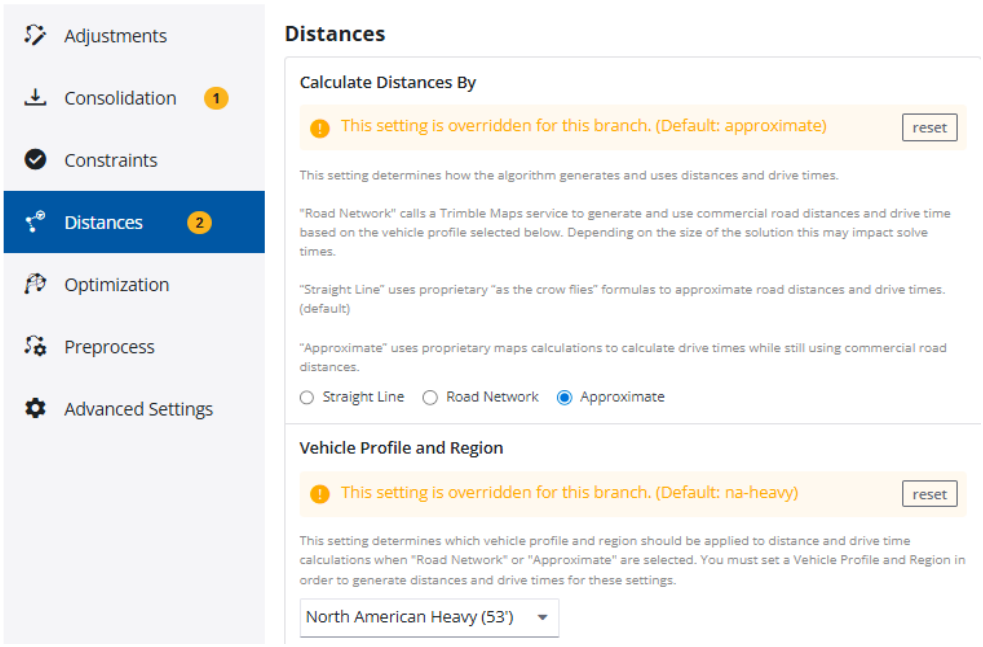

Figure 147 - Distances window for algorithm settings

- **Optimization** — Sets minimums and maximums for Route optimization and its penalties and passes.
- **PreProcess** — Sets the defaults for determining if trucks are identified by either their LoadID or TruckID.
  - This setting determines whether trucks are identified by their Truck ID or Load ID for matching and display purposes on the Route Planning and Fixed Route pages.
  - Fixed Route customers should use Truck ID unless they have unique Load IDs for each truck in their fleet, as this could cause issues with Direct Route files.
- **Advanced Settings** — Sets the strategies for calculating Routes.

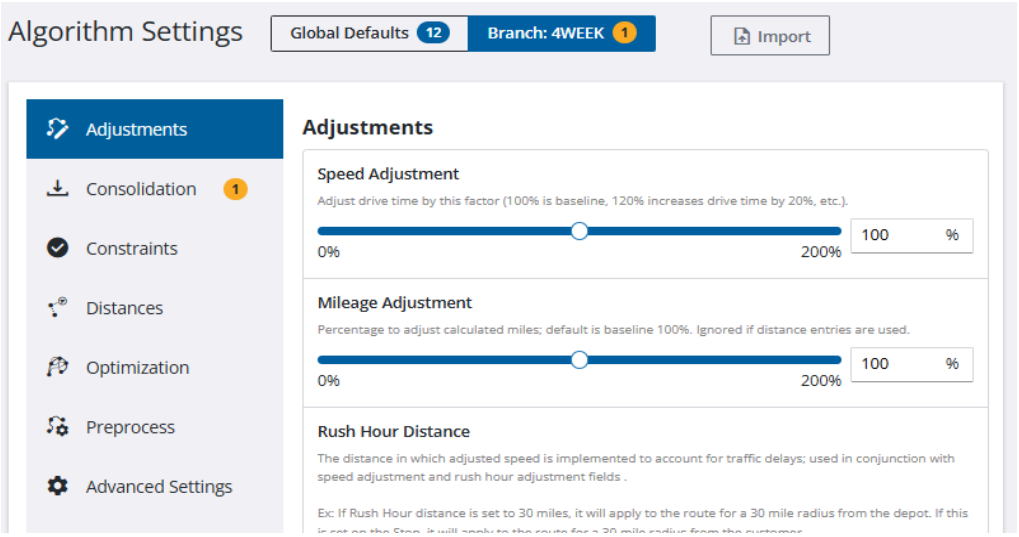

Figure 148 - Algorithm Settings page

Import Algorithm Settings

DirectRoute users can use the current *DRProject.config* file to set the algorithm settings.

1. Ensure the Consolidation settings in DRTrack are set properly (see Consolidation Exception for instructions).
2. Click on the *Import* button.
3. Choose the DRProject.config file stored locally on a computer.
4. Select which settings you would like to set based on the file, and click on *Save*.
   - The sections and settings in DirectRoute match the settings available in Daily Planner. Use the information on the Algorithm page for guidance.

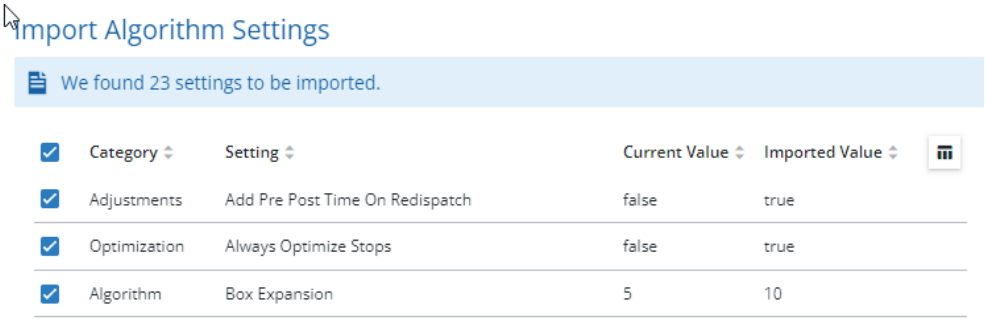

Figure 149 - Import Algorithm Settings window

Behaviors

Adjust Routing preferences like Auto Reschedule, Delivery Date Ranges, and Truck Reuse on the Behaviors tab.

Reuse Trucks

Enable this setting to reuse Trucks in the Route Building Wizard when they are already associated with a different Route during the same period.

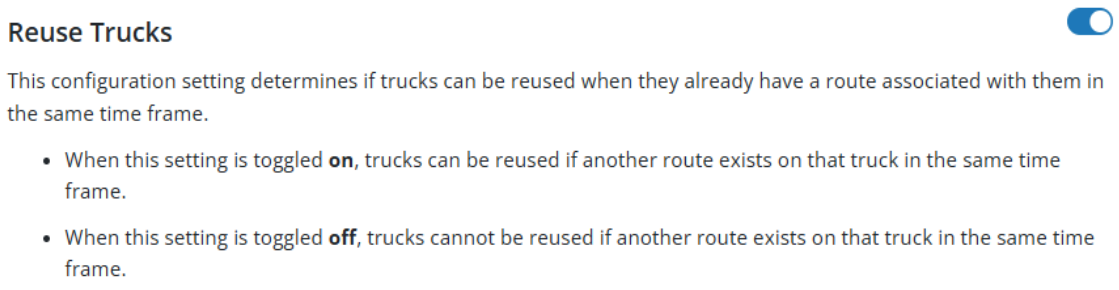

Figure 150 - Truck Reuse setting in Behaviors

Appendix

Color Labels

Daily Planner does not have color-picking functionality for Orders. Order colors are set using the DRTrack Color Columns and Daily Planner matches them with the best possible result.

- If colors are not assigned in DRTrack, color assignments are not passed into Daily Planner.
- A color is assigned to consolidated Orders only when one of the Orders lacks a color. A color from one of the other Orders in the group is applied.

Order colors are displayed in the following locations:

- Left edge of Order and Stop cards and grid row
- Order search results
- Label outlines on maps on Route Planning, Boundaries, Dispatch, and Fixed Routes pages:

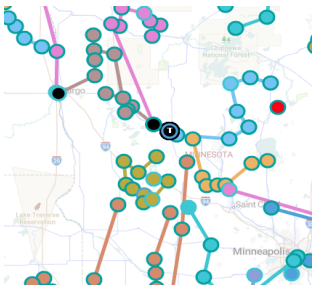

Figure 151 - Screen showing use of color-coded Routes and Stops

Use the table below for color approximations.

DR/DRT Color	New Color	Hex Code		DR/DRT Color	New Color	Hex Code
Aqua		#76BDF2		LightPink		#FFD8B1
Black		#000000		LightViolet		#FFB6C1
Blue		#549ED6		LightYellow		#FDF69E
Brick		#CF4932		Lime		#75C67D
Brown		#D28A6E		LimeGreen		#95C885
Chocolate		#D2691E		Magenta		#DF84D0
Crimson		#D13734		Maroon		#7F3542
Cyan		#43C0CE		MediumBlue		#7F3542
DarkBlue		#23257A		Navy		#2E41AD
DarkGray		#A9A9A9		Olive		#333364
DarkGreen		#385035		Orange		#5C9C63
DarkKhaki		#BDB76B		Orchid		#EBAC63
DarkOliveGreen		#556B2F		PaleGreen		#DF84D0
DarkPurple		#7A3D7A		PaleTurquoise		#C0E2BF
DarkRed		#8B0000		Peach		#AFEEEE
DarkTeal		#004C57		Pink		#FFB07C
Fuchsia		#C883DE		Plum		#8E98D8
Gold		#B5A53F		Purple		#C883DE
Gray		#808080		Red		#D3332A
Green		#75C67D		RoyalBlue		#4169E1
Indigo		#8E98D8		SaddleBrown		#7A4F48
LemonChiffon		#FDF69E		Silver		#C0C0C0
LightBlue		#ADD8E6		Teal		#009C9D
LightCyan		#A1D6D6		Turquoise		#77EDF0
LightGray		#D3D3D3		Violet		#8E98D8
LightGreen		#AFE1AF		White		#FFFFFF
LightPeach		#FFD8B1				

Resources

Related Documents

View additional ADP Documents here.

- Account Manager: Vehicle Routing Profiles
- DRTrack User Guide
- PC*Miler Hazmat Routing
- PC*Miler Route Types
- Restful APIs Developer Guide
- Vehicle Routing Profiles

Helpful links

- Content Tools
- CoPilot Overview video

Support

- Support phone number: 1-800-663-0626
- Email: support@trimblemaps.com