# DRTrack User Guide

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# DRTrack Overview

Appian DRTrack adds real-time visibility to DirectRoute with fleet tracking and web-based reporting. With the ability to use GPS data from a variety of hardware tracking systems and devices, DRTrack can also provide online track-and-trace services for your customers, automatically updating estimated arrival and departure times for customer locations. Trip reporting lets you compare planned-vs.-actual route mileage, planned vs. actual driver hours and more. Web based reporting tool and GPS tracking.

Capture, store and update route data automatically with DRTrack and make it more widely available to business stakeholders — including your customers. DRTrack lets managers, customer service or sales personnel access delivery schedules, monitor route info, review estimated delivery times and trip history directly on the web. Give your customers secure access with DRTrack to only their shipment data. Offer DRTrack's high-value self-service options and win new business.

With DRTrack, our clients are provided the following services:

- Server and database maintenance
- Hardware with all associated maintenance and upgrades
- Database clustering and failover
- Physically isolated disaster recovery
- Server load balancing
- State of the art network security
- Technical support associated with DRTrack to end users

# Getting Started—DRTrack Set Up

DRTrack will require setup on a single virtual/physical instance of a server or PC with minimum configuration. Server requirements and configurations can be found in *DRTrack Server/PC Requirements*. Your assigned Appian Project Manager can provide you with any updates and/or changes, answer any questions, and assist the Site Administrator with the initial set up.

## DRTrack Server and PC Requirements

Server and PC system requirements may vary and can be affected by various factors such as other Appian software modules licensed and in use on the server and/or PC, the number of licensed users on the server and/or per customer, and the types of operating systems in use.

The *Connection Requirements Table* identifies the minimum requirements necessary for users to connect to a self-hosted DRTrack site. The *Web Server Configuration Table* identifies the minimum configuration requirements for larger loads distributed across multiple servers to run each or any combination of the primary components.

## Connection Requirements

| CONNECTING USERS | |
|---|---|
| Browsers | Minimum IE 9; recommend IE11, Chrome, Mozilla, Firefox |
| Required Connection | High speed/broadband data connection to the internet |
| Monitor | 19" min with 1024X768 resolution |
| User Permissions | Internet access to the following: DRTrack website, Reporting Server |

## Web Server Configuration

| | 0-100 TRUCKS | 100-350 TRUCKS | 350-700 TRUCKS | 1000+ TRUCKS * |
|---|---|---|---|---|
| Operating System | Windows 2016 Server, 32 or 64-bit w/IIS, .NET 4.5 | Windows 2016 Server, 64-bit w/IIS and .NET 4.5 | Windows 2016 Server, 64-bit w/IIS and .NET 4.5 | Windows 2016 Server, 64-bit w/IIS and .NET 4.5 |
| Database | SQL Server 2019 Express or greater w/SSMS | SQL Server 2019 Express, 64-bit w/SSMS | SQL Server 2019 Express, 64-bit w/SSMS | SQL Server 2019 Express, 64-bit w/SSMS |
| Processor | Quad core 2.8 GHZ or higher | Quad core 2.8 GHZ or higher | Quad core 2.8 GHZ or higher | Quad core 2.8 GHZ or higher |
| Memory | 4 GB | 8 GB+ | 16 GB+ | 32 GB+ |
| Hard Disk | 125 GB .Recommend Raid 0, 1, or 10 Array, DB Growth 5+ MB (device/month) | 160 GB. Recommend Raid 0, 1, or 10 Array, DB Growth 5+ MB (device/month) | 220 GB. Recommend Raid 0, 1, or 10 Array, DB Growth 5+ MB (device/month) | 220 GB. Recommend Raid 0, 1, or 10 Array, DB Growth 5+ MB (device/month) |
| Network Card | 1 GB dedicated NIC for Terminal Services | 1+ GB dedicated NIC for Terminal Services | 1+ GB dedicated NIC for Terminal Services | 1+ GB dedicated NIC for Terminal Services |
| Network Connection | Open /Public/ Ext IP; T1/T3 or higher | Open /Public/ Ext IP; T1/T3 or higher | Open /Public/ Ext IP; T1/T3 or higher | Open /Public/ Ext IP; T1/T3 or higher |
| Ports | Port 80 must be open for inbound and outbound traffic. Additional ports may be required for communication between IIS, SQL Server, 3rd party interfaces, etc. (dependent on how servers and applications are deployed) | | | |
| * | Special architectural considerations may need to be taken into account when this threshold is exceeded to an extraordinary degree. | | | |

## Server Requirements by Component

Each component can run individually or in any combination together. The server configuration for larger server loads can be distributed to multiple servers, to run each or any combination, of the primary components.

The following breakdown is provided for running each component as an individual server:

## SQL Server (2019 Express) Operating System

- Windows Server 2016, 64-bit
- SS Management Studio (SSMS)
- SS Data Tools (Business Intelligence) (SSDT)
- Visual Studio 2017
- ID with Database and System Admin credentials for DRTrack database
- Deploy read/write credentials for reporting services
- Admin folder permissions for a DRTrack report repository in SSRS website
- Port 1433 (or other) for database connectivity
- TCP/Named Pipes enabled
- Backup policy and procedures (mirroring, clusters, or other failover setups as directed by user's organization)
- Enterprise versions of SQL Server (2019 Express, 64-bit)
- Virtualization supported
- 10/100/1000 connection to other servers if stand-alone instance

### Drive Space Requirements

- Operating System and Paging File: expect 20+ GB
- Database Primary file, Log, and temp Database, Initial size: 250 MB (expected)
- Database average growth of 5 MB per month per device (or per route)
- GPS data is primary growth factor; rates can vary between providers based on number of points per hour returned; range of 1 to 10+ MB/month/device
- Planned Route Data is secondary growth factor; range of 1 to 2+ MB/month/route
- Recommend SCSI, SATA2, or SATA3 HD arrays
- RAID 0, 1, or 10 for primary data file (RAID 5 not recommended)
- Separate drives for primary data file, logs, and temp Database (better performance and speed)

### Memory

- Ensure operating system and database version support memory requirements
- 1+ GB for operating system (more is better)
- 1+ GB for normal database operations (more is better)
- Add 2+ GB per 100 tracking devices; add 1+ GB or more for reporting load

### Processor

- Recommend Dual Quad Core (or other multi-core processors)
- 2 cores for Operating System and 2 for Database basic operations
- Add 1+ core per 50 trucks, and 1+ core for reporting services (+ = better/faster)

## Website Operating System

- Windows 2016 Server, 64-bit
- .NET 2.0
- .NET 3.0
- .NET 4.5, with .NET extendibility
- Backup policy/procedures, load balancing, and other multi-server failover setups as directed by your organization
- Recommend Virtualization support
- 10/100/1000 connection to other servers if stand-alone instance

### Drive Space Requirements

- Operating System and Paging File: expect 20+ GB
- DRTrack Website: 150 MB
- Log file growth: configurable log levels for troubleshooting
- Recommend SCSI, SATA2, or SATA3 HD arrays
- RAID 1, 5, or 10 for redundancy and failure protection

### Memory

- Ensure operating system and database version support memory requirements
- 1+ GB for operating system and add 1+ GB per 200 DRTrack users

### 3rd Party GPS Data Interfaces Operating System

- Windows Server 2016, 64-bit
- .NET 2.0
- .NET 3.0
- .NET 4.5 with .NET extendibility
- 10/100/1000 connection to other servers if stand-alone instance

### Drive Space Requirements

- Operating System and Paging File: expect 20+ GB
- Sync Service: expect 250+ MB per instance of a sync service installation
- Multiple sources of GPS data allowable, each with its own Sync Service
- Additional considerations for HD space needed
- XML, Flat, or other file interface (saved or deleted after processing)
- Local or database server
- Log file mode: ERROR, DEBUG, INFO, etc.

### Memory

- Ensure operating system and database version support memory requirements
- Add 1+ GB for Operating System, and additional 1+ GB per Sync Server instance

# Typical DRTrack Server Setup

DRTrack will require setup on a single physical or virtualized instance of a server with the minimum configuration. The specs for this server are for standard users with approximately 350 vehicles (specs would increase with more than 350 concurrent users/phones).

- Windows 2016 Server, 64-bit with IIS installed
- Open/external IP (with external URL setup for accessing website)
- 2.4 GHz
- 8 GB+
- 125 GB drive space (expect 5 MB of growth per device/month)
- Port 80 open for inbound/outbound traffic
- T1 connection between servers, client access; serving pages to/from website

**Other Recommendations**

- Consider RAID 10 for performance/data redundancy
- SCSI, or SATA2 or SATA3 drives for faster HD drive performance to access DRTrack database
- Dual/Quad processors for larger loads
- 8+ GB RAM
- T1/T3 connection

**Access and Login**

Every DRTrack user will be assigned to a specific role. Each role has varying permissions, dependent on the access level granted. Your Site Administrator will be responsible for assigning these access levels and roles, as well as site maintenance and updates. The typical DRTrack site includes the following assigned roles:

- **Customer Service** — 24/7 access to current status of deliveries, searchable by Account ID, order number, and/or order date; can be accessed from any computer or mobile device
- **Dispatch (Branch)** — View/modify orders, trucks and drivers; dispatch and track routes
- **Account (Regional)** — Add/edit branches and accounts; perform audits
- **Administrator (Enterprise)** — Add/assign users, module and site maintenance

To get started using DRTrack, contact your Site Administrator for access level role assignment and a DRTrack Login ID/Password. The Site Administrator will also provide the DRTrack website URL address.

Authorized users should access DRTrack using the URL provided by the Site Administrator.

1. Launch a web browser (Chrome, Internet Explorer, etc.)
2. Type in the URL address of your DRTrack site (provided)
3. Select a login screen
   a. If assigned the *Customer Service* role, select the first option, *Customers: Track Your Orders*
   b. If assigned to any other level (*Dispatch, Account, Administrator*), select the second option, *Login to DRTrack*
   c. Enter the Username/Password when requested

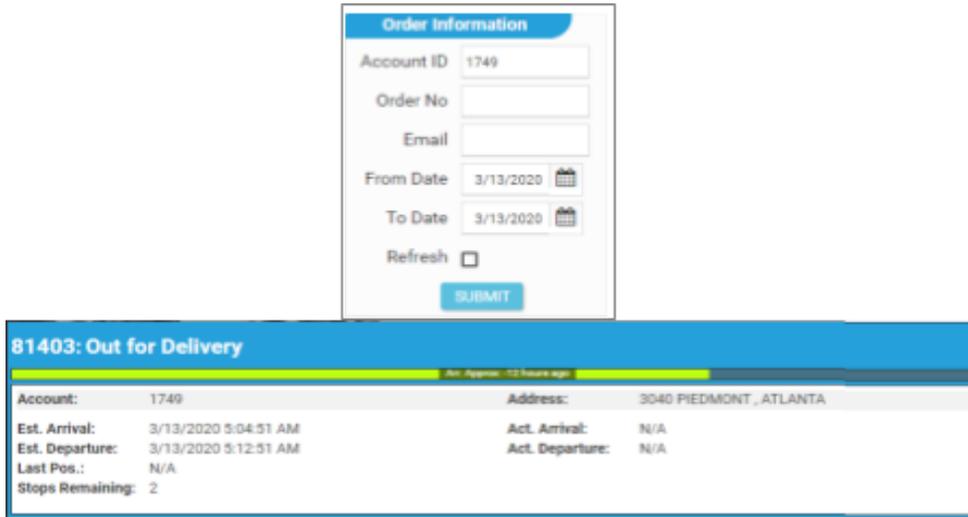*Figure 1—DRTrack Login for Dispatch, Account, Administrator Login*



*Figure 2—Customer Service Order Tracking*

# Site Administration

Within DRTrack are different levels of access, determined by roles that you may be assigned to perform. Each role is then assigned to a **User Group** with specific permissions, views and capabilities. The Site Administrator has sole control of assigning roles and capabilities within DRTrack.

Typical **User Group** names include **Customer Service**, **Dispatch**, **Branch Manager**, and **Administrator**.

- The **Customer Service Group** may have permissions to view and modify orders only.
- The **Dispatch Group** may have permissions to view and modify orders, create and modify routes, trucks and drivers within their assigned branch.
- The **Branch Manager Group** may have the same permissions but expanded to include all branches, and they may also be able to create new customer accounts and orders.
- **Administrators** have full access to all actions within all branches, as well as the ability to create new users and customize the capabilities of each User Group.
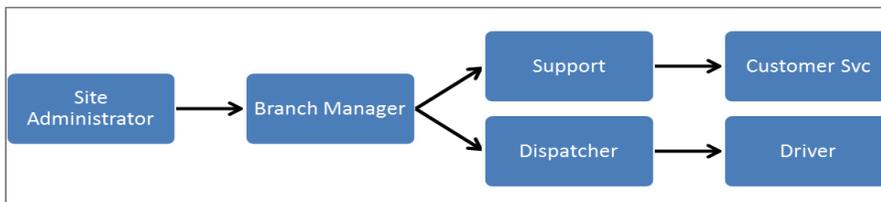


*Figure 3 — User Group Manager*

# Bulk-Management ― Import / Export Users

The Import and Export User functionality allows administrators to bulk-manage users on DRTrack. Quickly determine if a user's email has been synced with the Trimble ID and easily grant or remove access.

1. Click the *Import / Export User* button
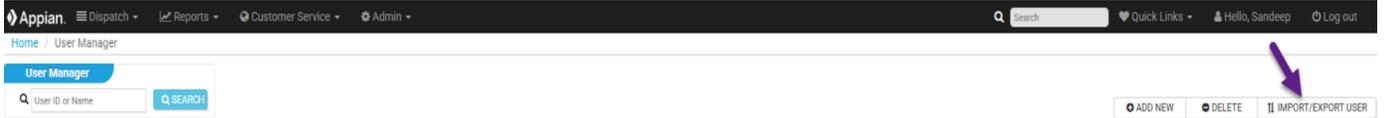


*Figure 4 — Import / Export User Button*

2. View uploaded data including users details and permission group
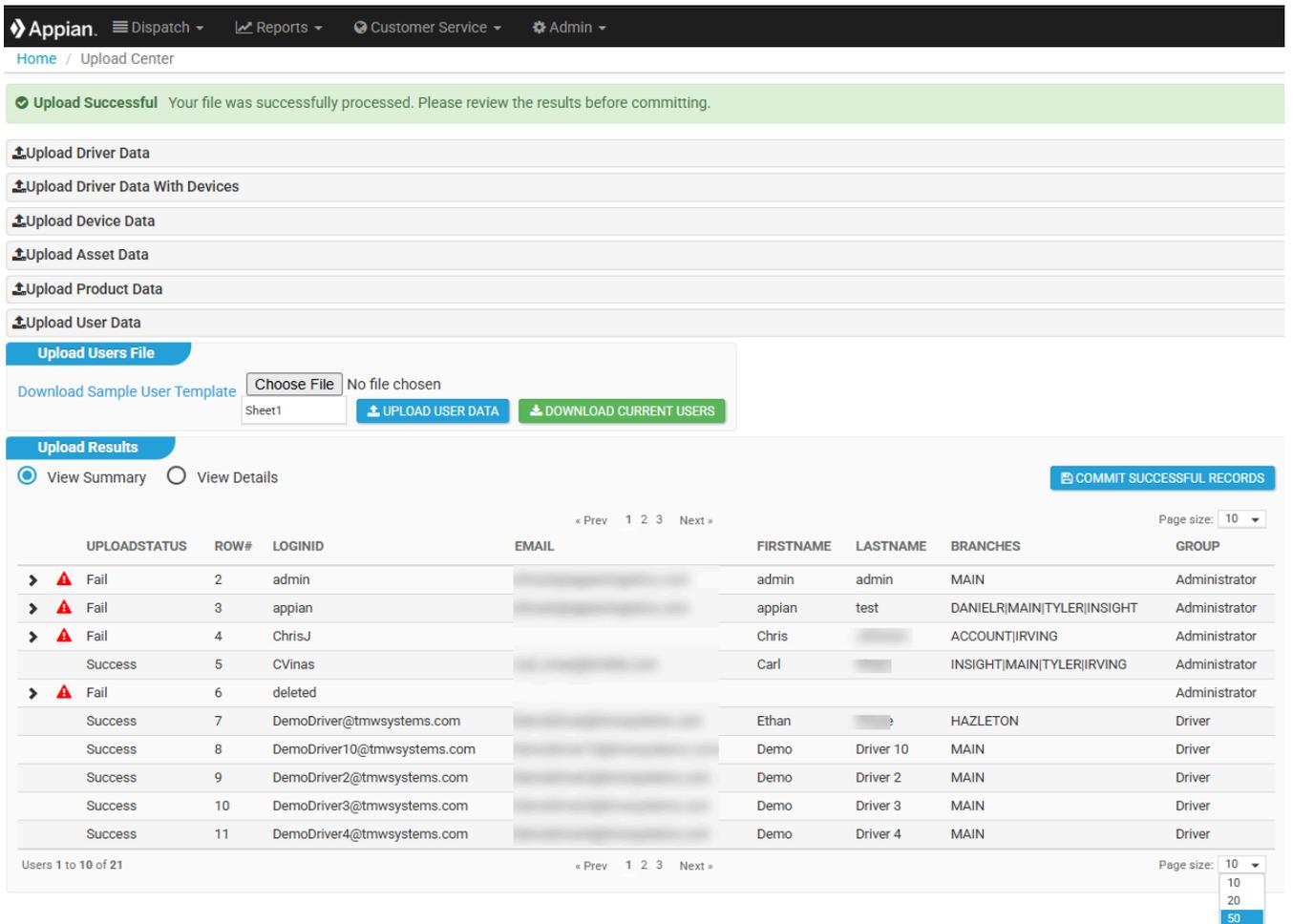


*Figure 5 — DRTrack Upload Center*

See the Importing and Exporting Users Guide for additional details.

# User Group Manager

The **User Group Manager** is assigned to manage permissions associated with the different user roles within each User Group. Each role is like a point of service within their respective group with abilities assigned by hierarchy; each point within the hierarchy would have greater or lesser access/capabilities than others.

For example, the **Account Manager** role could be added to this hierarchy (between **Administrator** and **Branch Manager**) and assigned all capabilities of each role below **Branch Manager**, but less capabilities than an **Administrator**.  To access the User Group Manager, go to **Admin > Site > User Groups & Permissions**.
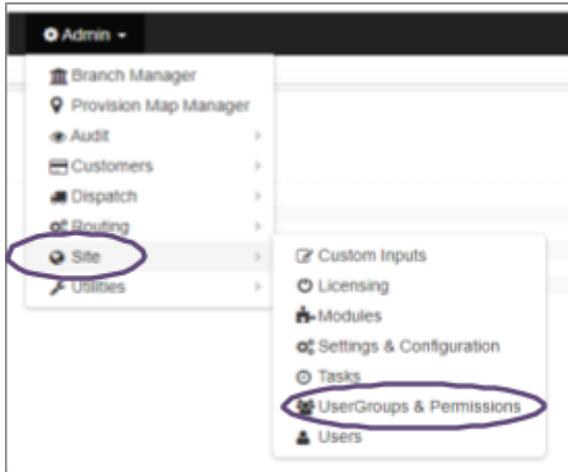


*Figure 6 — Manage User Groups & Permissions*

1.  Use the drop down menu to select a User Group role to edit, or **+Add** to add a new one
2.  Edit the following as needed:
    a.  **Manage Roles**—Assign permissions to each Role
    b.  **Manage Modules**—Assign permissions to each User Group
    c.  **View Permissions**—View current permissions assigned to the selected User Group
    d.  **Landing Page**—Set the default landing page; the 'Home' page for all roles except Customer Service
    e.  **Role**—The permission levels assigned to each User Group (ex. Branch Manager, Dispatcher, etc.) should have all the same abilities of each role assigned under the branch
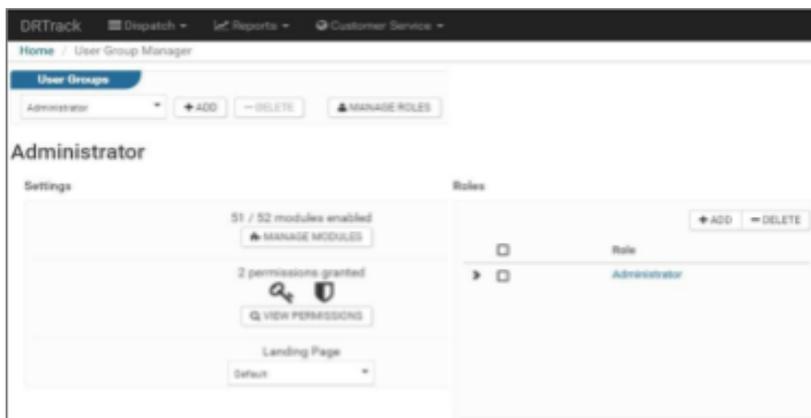


*Figure 7 — User Group Manager*

## Manage Roles (Permissions)

The **User Group Manager** is generally tasked with managing roles within their group. This entails assigning permissions, or determining which actions each *Role* may need to perform.

Go to **Admin > Site > User Groups & Permissions** and click on *View Permissions.* Permissions are divided into 12 categories.

* **Routing**—Permissions to view, create, modify, delete, and audit routes; manage master routes and trucks,

receive emails when route time violations occur, and run optimization across multiple routes

- **Dispatch**—Permissions to export routes, manually log in and off routes, and manually change arrivals and departures
- **Orders**—Permissions to view, create, modify, delete, and audit orders; create, modify, and delete appointments, manage master orders, and receive emails on completed forms and order reservations
- *Accounts*—Permissions to view, create, modify, delete, and audit accounts
- **Branches**—Permissions to view, create, modify, delete, and access all branches
- **Drivers**—Permissions to view, create, modify, and delete drivers, and manage carriers
- **Users**—Permissions to view, create, modify, and delete users
- **Devices**—Permissions to view, create, modify, and delete devices
- **System Task**—Permissions to view, create, modify, delete, and run system tasks
- **Site**—Assigned as an administrator with full permissions for all actions
- **Route Calendar**—Permissions to edit notes on the Route Calendar
- **Appointment**—Permissions to grant appointment approvals



*Figure 8 — Manage Roles*
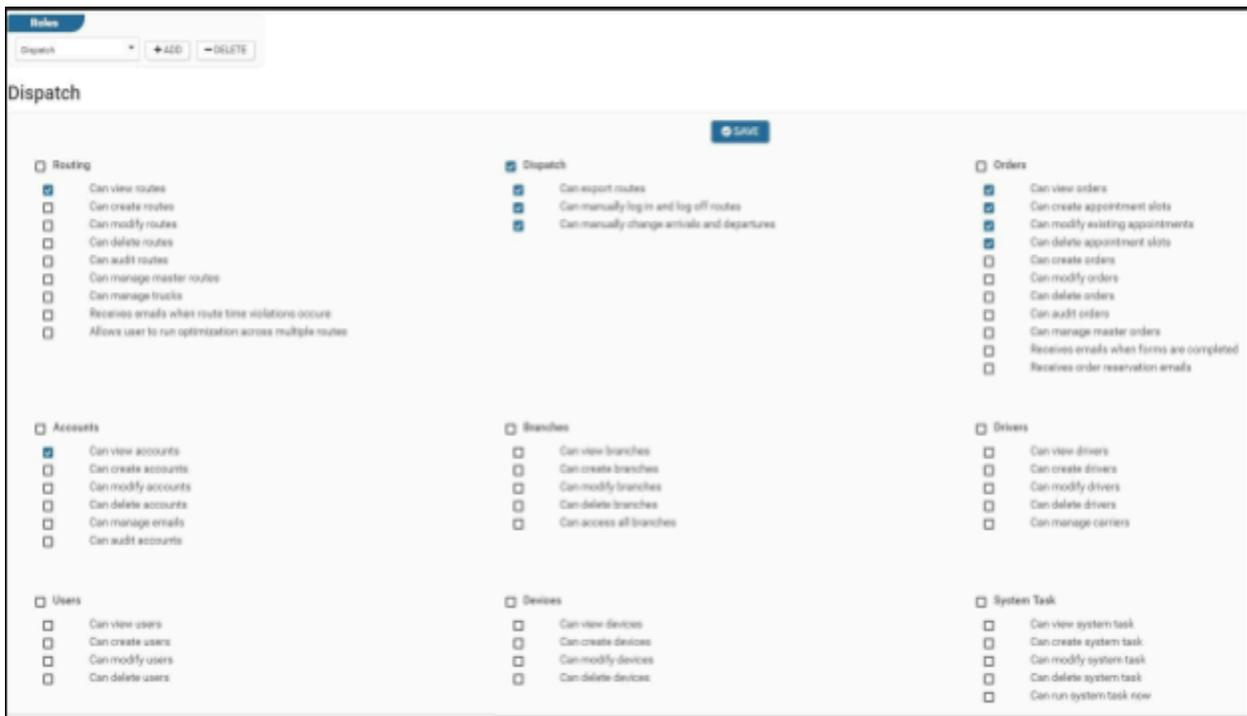
1. To edit, select the *Role* type from the drop down menu at the top (left) of the page
2. Place a checkmark in the box to the left of the modules and actions to be accessible to the Role
3. Click **Save** when done

## Manage Users

The *User Manager* page is used to add new users and assign them to branches, assign *Roles* and *User Groups*, reset passwords, and set up notification emails.

## Create a New User

Go to **Admin > Site > Users** and click the **Add New** button.
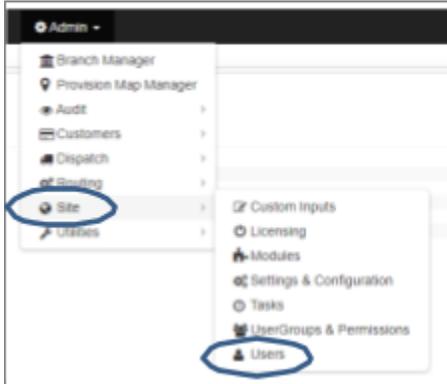


*Figure 9 — Manage Users*



*Figure 10 — Create New User*



← Screen Tabs
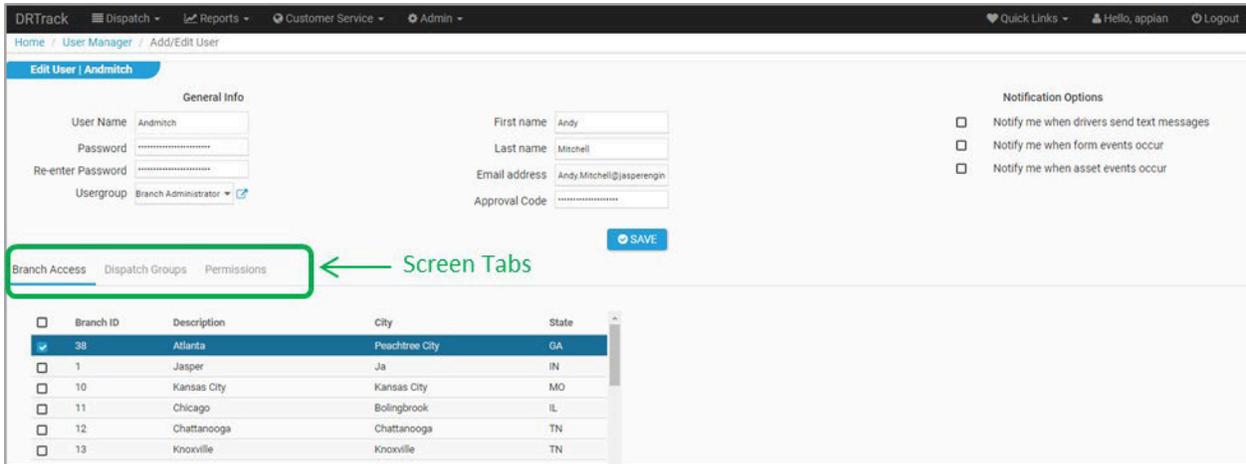
*Figure 11 — Assign Branches, User Groups, Permissions*

1. Fill in all the fields under **General Info**

2. Assign the **User Group** role using the drop down menu

3. Select the appropriate notification boxes under **Notification Options**

4. Use the tab **Branch Access** tab to assign the user to the appropriate branch(es)

5. Use the tab *Dispatch Groups* to assign to any of the established *Dispatch Groups*

6. Click on the *Save* button when done

## Edit Current Users

Go to **Admin > Site > Users** and select the user record from the list in the *UserID* column.

1. Edit any general info as needed (name, email address, password, etc.)

2. Use the *User Group* drop down menu to designate the *User Role*

3. Select        ⬀ to configure the *User Group* (view or change the configuration settings for each role)

4. Approval Code: Enter a code that identifies who/why access is approved (if used)

5. Notification Options: Select all options that may apply to the user

6. Use the tab *Branch Access* to view and/or edit branch assignments

7. Use the tab *Dispatch Groups* to view and/or assign to a *Dispatch Group*

8. Use the tab *Permissions* to view and/or assign permissions

## Manage Modules

The *Module Manager* provides the Site Administrator the ability to control which menu items and actions will be accessible for each *User Group.* This entails assigning permissions, or determining which actions each *User Group* may need to perform.

Additionally, *Quick Links* shortcuts that appear on the default Home page and in the *Quick Links* tab on the main menu, are selected and set up from the *Module Manager*.

To access the *Module Manager*, go to **Admin > Site > Modules**.
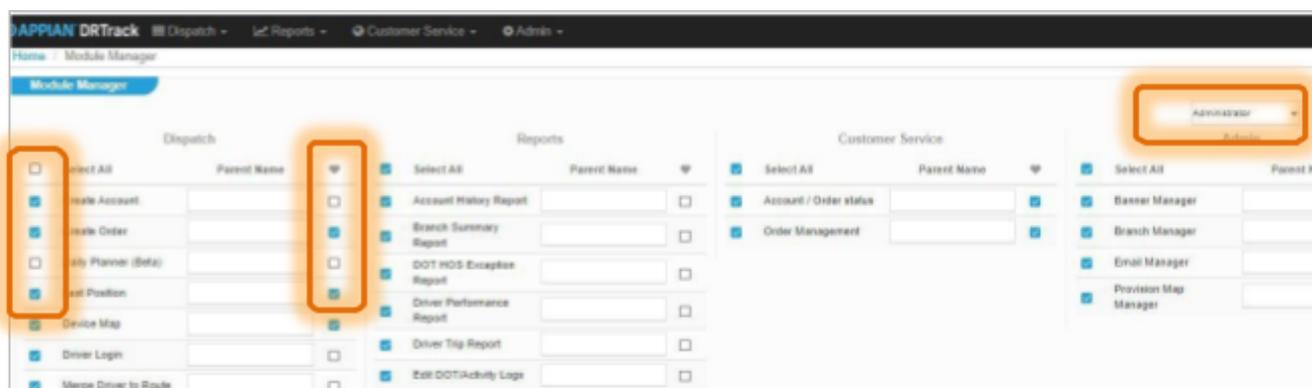


*Figure 12 — Manage Modules*

## Make Modules Accessible

To make modules accessible to a *User Group*

1. Select the *User Group* type from the drop down menu in the **middle** of the top of the page

2. Place a checkmark in the box to the *left* of the modules or actions to make them accessible to the *User Group*

3. Click the *Save* button when done

> *Note: The box on the right of the module/actions, with the heart icon above it, is used to add the item to the Quick Links shortcut.*

## Create Quick Links Shortcut

Quick Links appear on the far right side of the main landing page, and in the far right of the menu at the top of every screen.

1. Select the *User Group* type from the drop down menu in the middle of the top of the page

2. Place a checkmark in the box to the *right* of the modules or actions to make them accessible to the *User Group* as a *Quick Links* shortcut.

3. Click the *Save* button when done.
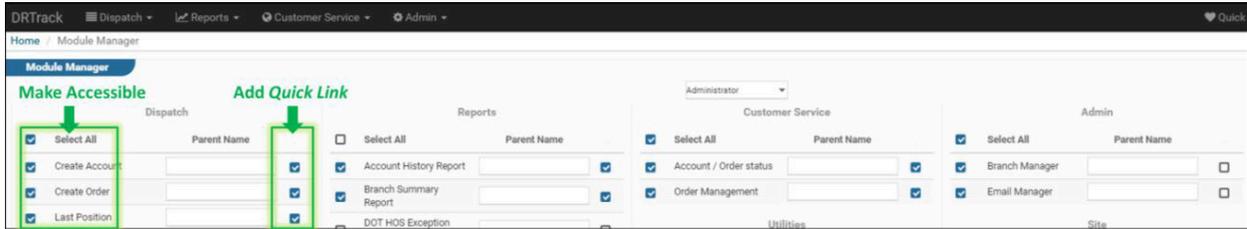


*Figure 13 — Make Modules Accessible*

# View Permissions

View the menu items and actions, or permissions, that are currently assigned to each *User Group*, and make changes when necessary.

Go to **Admin > Site > User Groups & Permissions** and click on **View Permissions**.



*Figure 14 — View Permissions*

1. To edit, select the *Role* type from the drop down menu at the top (left) of the page

2. Place a checkmark in the box to the *left* of the modules and actions to be accessible to the *Role*

3. Click the *Save* button when done

# DRTrack Dashboard

The DRTrack Dashboard is divided into four sections, as numbered in the figure below:

- *Main Menu (1)*—Appears at the top of the screen on every page in DRTrack; four primary sections provide assigned, accessible actions based on the user's **assigned role**; plus *Quick Links* (configured shortcuts), user admin (*Hello User*), and Logout

- *Dashboard (2)*—Statistical snapshot of route and stop statistics for the current day +/- 1, including completed, violated, delayed, active, not taken, etc.

- *Active Routes (3)*—Provides a snapshot of active routes, including driver assignments and devices, branch, start and end times, number of stops and miles, etc.

- *Quick Links (4)*—Also available in the upper right corner of the *Main* menu, *Quick Links* are configurable shortcuts for a *User Group* to pages within DRTrack most frequented or used by that group (see **Create Quick Links Shortcut**)



*Figure 15 — DRTrack Home Page*

Each of these four sections is briefly described below. Click on the links to go directly to the respective sections, or continue reading to view all.

- **Dispatch** — Dispatch provides access to many route, order and device actions available to the dispatcher, including order and account creation, route edits and re-dispatch, and *Driver/Device Map, Route Board, Route Calendar* (*Resource Planning*), etc.

- **Reports** — Provides access to configured reports, including *Account History, Branch Summary*, *Driver Performance,* and *Trip Reports*, etc.

- **Customer Service** — Provides *Customer Support* access to manage orders and accounts

- *Admin* — Provides access to branch and customer accounts, set up and manage drivers, users, and devices, input configuration requirements for import/export between DirectRoute, as well as other database management functions; access levels within this tab vary among DRTrack users and are controlled by your site administrator

# Dispatch Tab

The Dispatch tab provides access to the most frequented actions regarding daily operations. This would include managing orders, drivers, devices and/or routes.

The following actions can be accessed from *Dispatch*. Click on each link below to go directly to that item, or continue reading to discover all actions performed through *Dispatch*.

- *Create Account*
- *Create Order*
- *Device Map*
- *Driver Login*
- *Last Position (Device)*
- *Merge Driver to Route*
- *Re-dispatch Routes*
- *Route Board Page*
- *Route Calendar*
- *Build Routes Page*
- *Routes Page*
- *Route Summary*
- *Route Map*
- *Unloaded Orders*

## Create Accounts (Edit, Delete)

There are two ways to create new customer Accounts:

- Go to *Admin > Customers > Accounts* and select the *Add New* button

Using the later option, an existing account can also be edited or deleted, making this the most preferred method. Regardless of which option is used, both options will open the Account Management Detail screen, where all the new customer info will be entered.

1. Input all pertinent account information (ex. Delivery Time Windows, Time Window Adjustments, Quantity Fields, User Fields, etc.)
2. Select Geocode (top of the screen) to locate the Lat/Long matching the customer address
3. Select Save after all editing is completed

If editing or deleting a current account record, go to *Admin > Customers > Accounts.* Follow the instructions above to edit any record. To delete a record, select *Delete* from the top right corner of the screen.

Additional actions available on the account page include:

1. Manually enter Lat/Long coordinates to actual stop addresses; use the mouse to move the green circle to adjust location on the map then *Update Location* or *Cancel* when done

2. Update *Load Default* to the customer account

3. *Save as Default* to save as 'default' info (see *Load Default*)

4. *Audit* will display a list of recent DRTrack type activity performed on an account

# Create Order

There are several ways to create an order in DRTrack, but *Dispatch > Create Orders* is the most direct method. Some of the other places in which an order can be created include
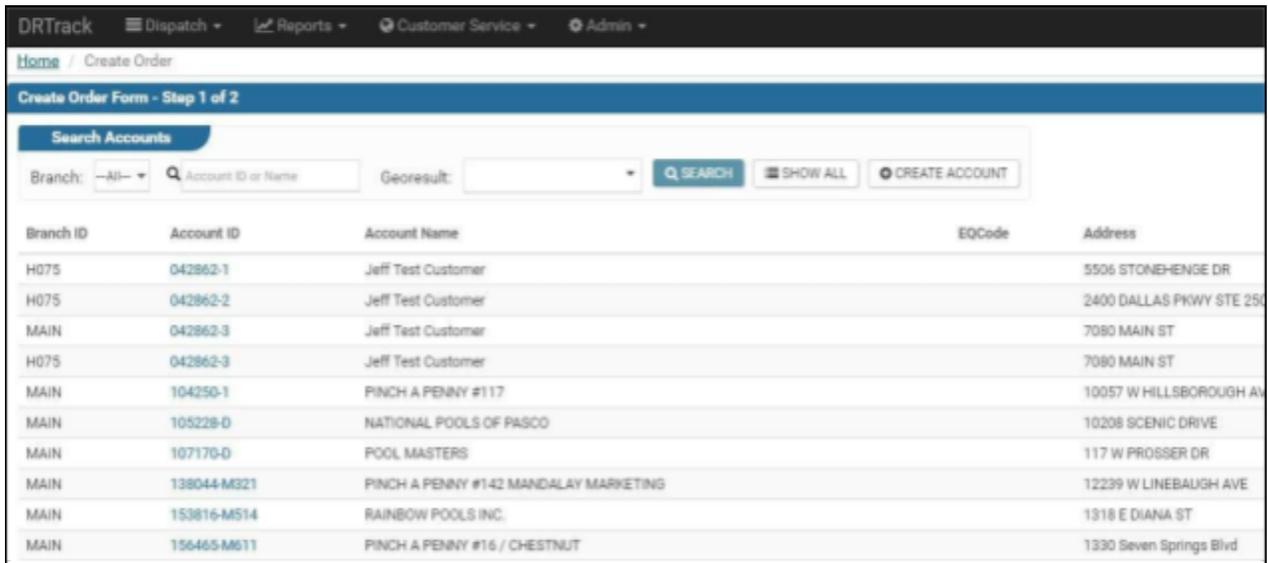
1. *Dispatch > Routes*

2. Customer Service > *Order Management*

3. *Dispatch > Route Calendar*

> **Note:** *Any order created on the Create Orders page will be an Unloaded Order. To add/load the newly created order to an existing route, navigate to Dispatch > Routes > Unloaded Orders.*

The steps for creating an order are the same, regardless of where you start.

From *Dispatch > Create Orders*

1. Use the search function to identify the correct branch and *AccountID*

2. Once the *AccountID* is listed on the page, click on it under the *AccountID* column, OR

3. Select *Create Account* to add a new account



*Figure 16 — Create Order Step 1*

4. Enter all pertinent *Account* and *Order* information, including *Quantity* and *User Fields* data

5. Select the *Time Windows and Time of Day Adjustment* tab to enter all necessary info

6. Select *Finish* from the top right corner, to complete the order input

*Figure 17 — Create Order Step 2*

Upon completion, the confirmation screen will appear with the new order highlighted.



*Figure 18 — Order Confirmation Step 3*

## Device Map

*Device Map* allows a user to select a device and/or vehicle to view planned, completed or uncompleted routes assigned to a specific device.

The appearance of the map itself can be customized with a variety of map styles and overlays. To change the map style, click on the stack icon in the upper right corner of the map and select the map style and overlays desired.
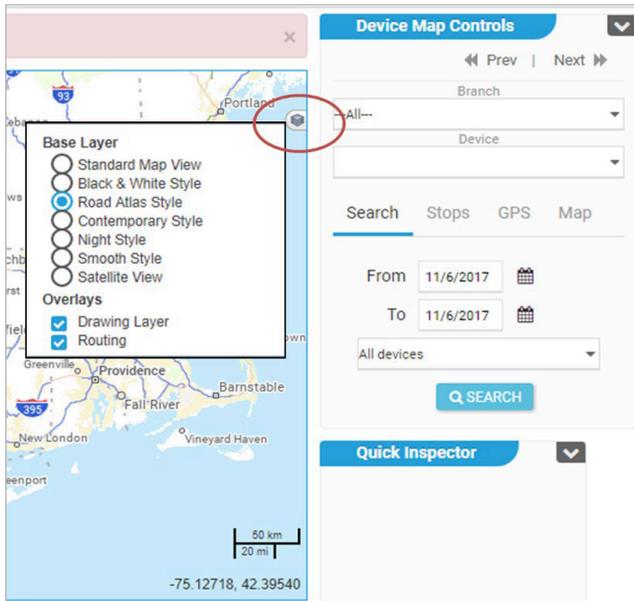
*Figure 19 — Select Map Style and Overlays*

The *Device Map* info box, located below the map, displays the route details for the selected device, and the corresponding stop information.

- *Seq*
- *Account ID*
- *Account Name*
- *Planned Arrival/Departure*
- *Actual Arrival/Departure*
- *Estimated Arrival/Departure*
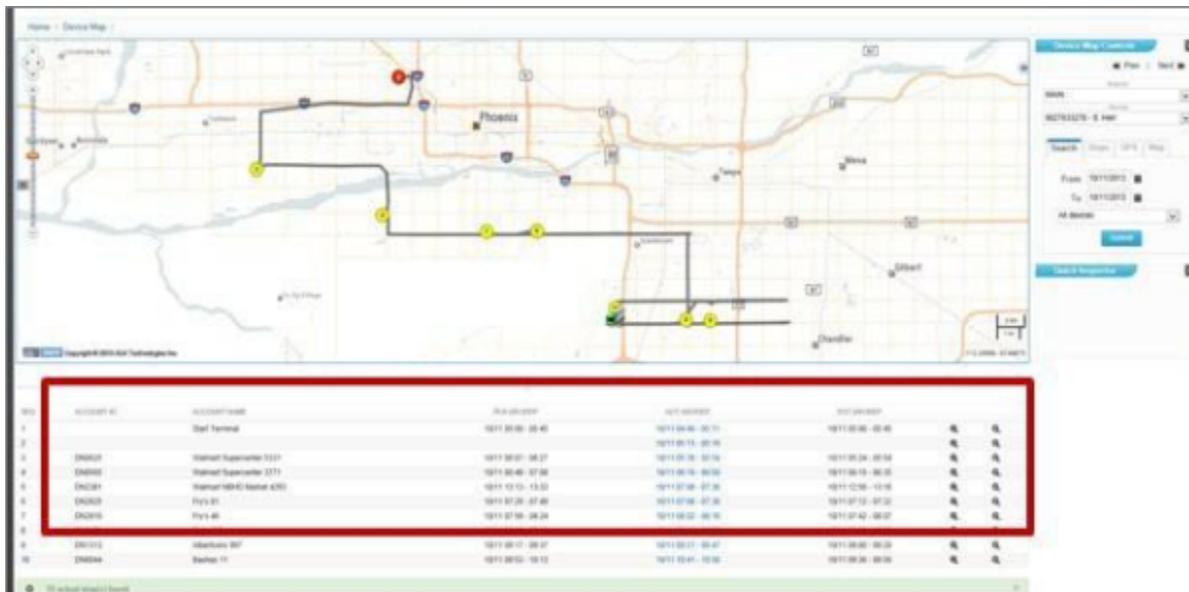


*Figure 20 — Device Map*

To view a device's planned, completed or uncompleted route info

1. Use the controls on the right to select a branch and device from the drop down menu

2. Select *From/To* dates

3. Below the date boxes, use the drop down menu to choose which devices to view

4. Zoom to a specific stop on the map by clicking on the 🔍 zoom icon, to the right of each stop

> *Note: Device Map for a specific route and/or Driver from the Route Summary page (Dispatch > Routes) by selecting the road icon* 🛣 *adjacent to the desired route.*

The *Device Map Controls* and *Quick Inspector* menu can be undocked and moved to either the left or ride side of the map. Use the grey drop down arrow in the top right corner of each menu to select the docking location, or hold the arrow and drag the box to the desired location.
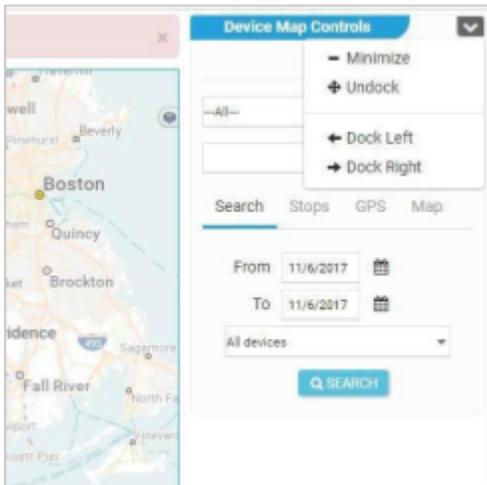


Figure 21 — Device Selection, Device Map Controls

# Driver Login

*Driver Login* lets you log in a driver to a route, or ***pre-assign*** or log a driver off of a route.

1. Select the branch and enter the route number, if known

2. Select the *DriverID* and input *Login Time* (*Date/Time* the route should begin)

3. Select *DeviceID* assignment (if specific to driver, this will prepopulate automatically)

4. Input *TruckID* for the route and *Odometer Start*, if known

5. Select *Log In/Update* (or *Log Off*, *Pre-Assign*)



Figure 22 — Driver Login

*Note: Only Drivers associated with the selected Branch will be displayed.*

## Last Position (Device)

This option allows the user to select any device to view its last reported position on the map. This information is only available if the driver is logged in to the device.
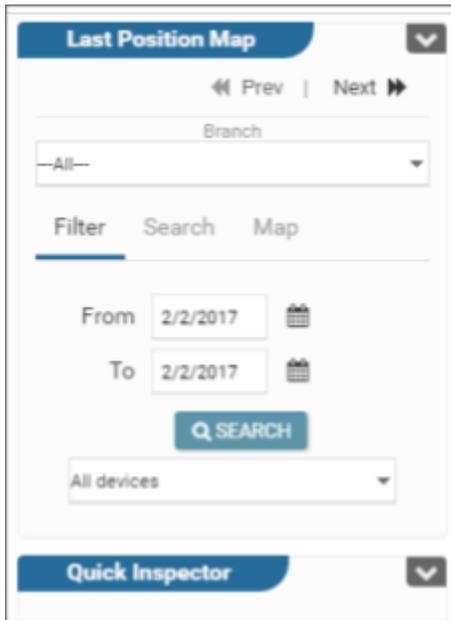


*Figure 23 — Device Last Position*

Locate the branch for the device, or select ALL.

- *Filter*—Search for devices by date
- *Search*—Search for devices by address location on the map in relation to the selected device(s)
- *Map*—Search the map for last seen position stopped, moving, or clustered points

## Driver Hours Of Service (HOS)

*Only available with PeopleNet or Samsara.* Configuration required for the HOS to show in DRT.

- HOS data import service and scheduler provide up-to-date driver hours from CPIH.
- Service provides added HOS controls in the UI and HOS details in the Driver experience.
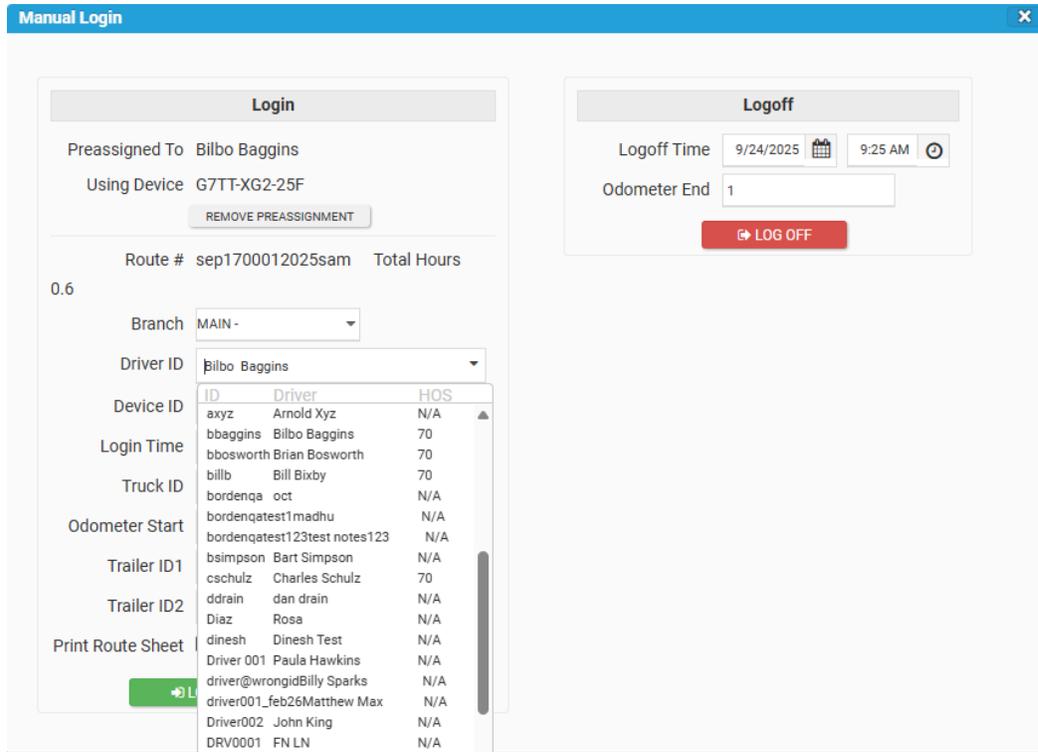
*Figure 24 — Driver ID with HOS information*

# Merge Driver to Routes

Merge or unmerge drivers to and from routes.

1. Select the branch and route date and eligible routes will populate
2. Select the negative route (route to be merged) and the *Merge to* route, then click the *Merge Routes* button
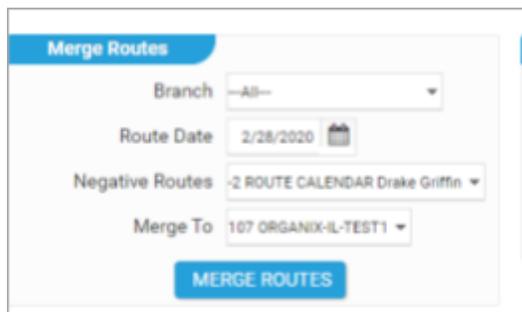


*Figure 25 — Merge Routes*

To unmerge routes

1. Select the branch and route date and eligible routes will populate
2. Select the route to unmerge, then click the *Unmerge* button

*Figure 26 — Unmerge Routes*

# Re-Dispatch Routes

From the main menu, select *Dispatch > Routes*.

1. Use the drop-down menu to select the correct Branch identifier
2. Set the *From* date to the day that the routes are to be dispatched (defaults to the current date); edit the time if necessary (earliest time that trucks can depart)
3. Set the *To* date to the last day routes should be dispatched (same date as *From* unless routes are scheduled to leave after midnight); edit the time if necessary (latest time that trucks can depart)
4. Select *Search;* all routes that meet the set search criteria should now be displayed
5. Use the mouse tool to hover over and review route info, or use the menu tools to make additional route adjustments and/or edits if necessary



*Figure 27 — Dispatch Routes*

**Load Unloaded Orders** — Review and load any orders that are not currently loaded on a route

**Invert Route** — Reverses the order of delivery of the stops, from first to last

**Reschedule** — Reschedule the dispatch date of the route

**Export** — Export the finalized routes back to DirectRoute and/or an Order Management Module *Optimize*—Use to reposition stops on a route, after changes have been made to stops that affect delivery dates/times

**Reschedule** — Reschedule stop delivery window times and/or date *Move Stops*—Move stops between routes, from one to another *Audit*—Provides a brief overview of events that have occurred

## Route Board

The Route Board is map centric; it enables viewing existing routes and orders on the map, as well being able to see the orders and routes in list format below the map. You can access the *Route Board* (*Dispatch > Route Board)* to review planned routes and stops, and make changes as needed.

- Additional actions that can be performed from the Route Board include
- View Unloaded Orders

- Geocode Unloaded Orders
- Create/build new routes
- Assign Points of Interest (POI's)
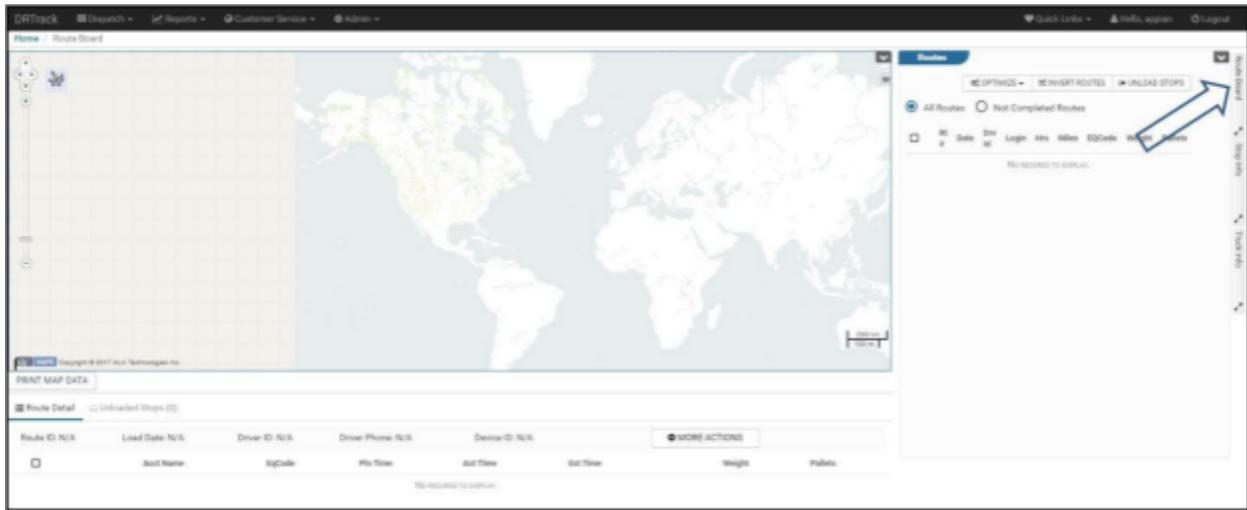


*Figure 28 — Route Board*

By default, the search dates appearing will default to the current date. You only need to select the calendar icon to change the dates.

Select the *Route Board* menu on the right to enable Branch and/or date selection.

1. Use the drop-down arrow to see available branches
2. Use the left mouse key to click and select a branch
3. Select the calendar icon to change the date, or type the date (mm/dd/yyyy)
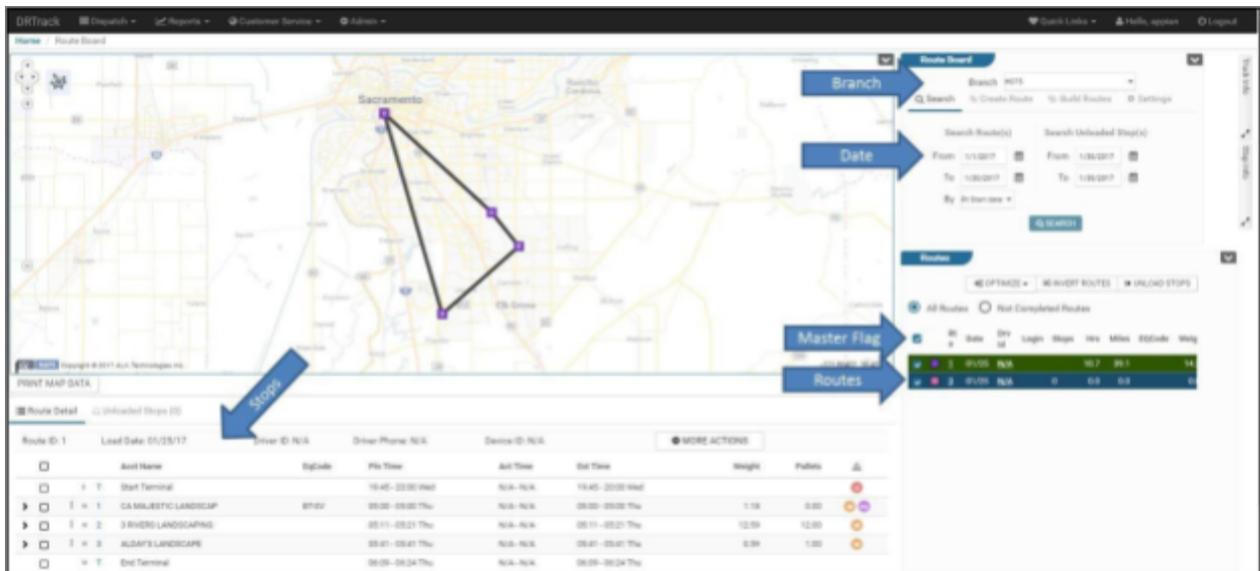


*Figure 29 — Route Board Properties*

The active routes for the selected branch/date will appear directly below the *Route Board* menu on the right. By default, the master flag box will be checked, selecting all the routes/stops for the selected branch/dates.

1.  Deselect the *Master Route* box
2.  Select just one route (Rt# column) to view it on the map
3.  Selected route(s) will be highlighted blue
4.  On the bottom of the screen, the list of stops for the selected route will appear
5.  Deselect the route in the same manner and the route lines will disappear, but the route details will remain in the bottom screen

*Note:* To adjust the map view area, click and hold the mouse button and drag the screen to adjust. You can also zoom in/out of an area; double click the mouse over the desired area or hold the shift key and click the mouse to draw a box around the desired area.



*Figure 30 — Route Selection*



*Figure 31 — Route Board Map*

## Build Routes Page

Building routes on the *Route Board* is designed for building routes in bulk using an existing truck profile and a set of unloaded orders.
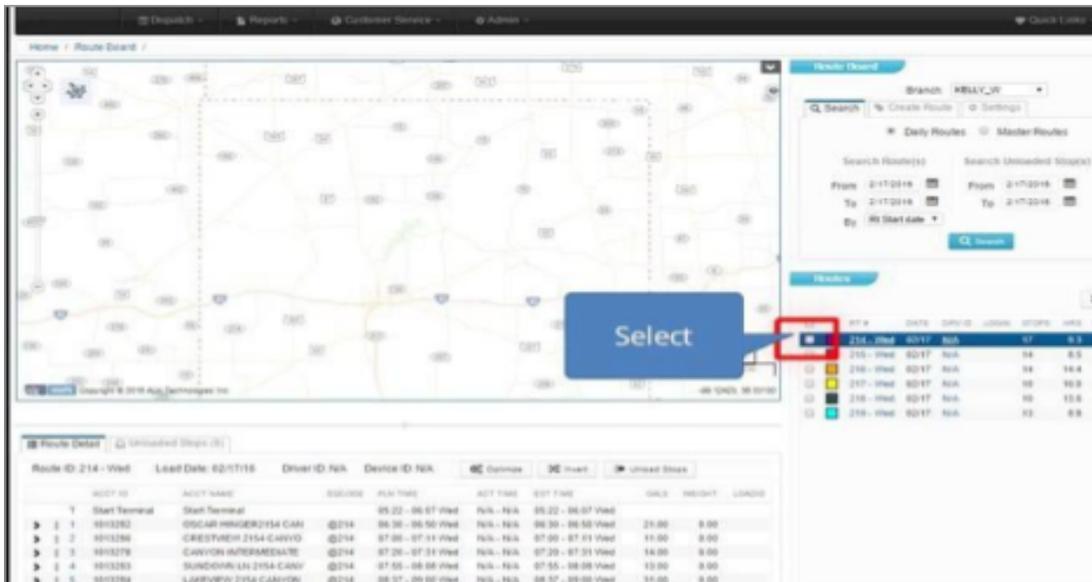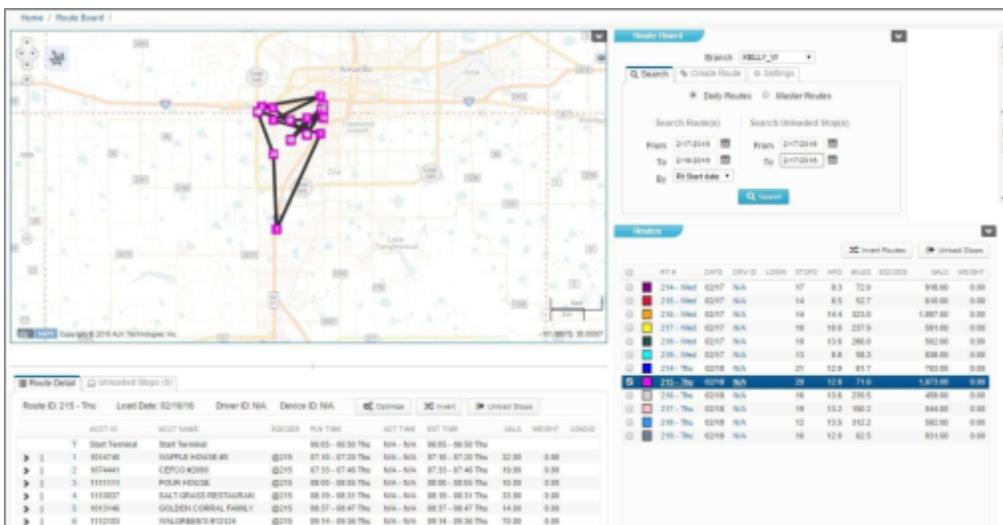
To enable this function, it must first be turned on in *Settings & Configuration.*

1. Navigate to *Admin > Site > Settings & Configuration*
2. Use the drop down arrow adjacent to *Section* and select *UI*
3. Type *enablebuildroutes* in the filter box then select *Filter*
4. Select *Edit*, then *Value* to enable the function (checkmark the box)
5. Select *Update* to save and complete

Now return to the *Route Board* (*Dispatch > Route Board)*. Generally, the Route Board should be empty of any active daily routes, and there should be orders ready to load in the *Unloaded Orders* pool.



*Figure 32 — Enable Build Routes*
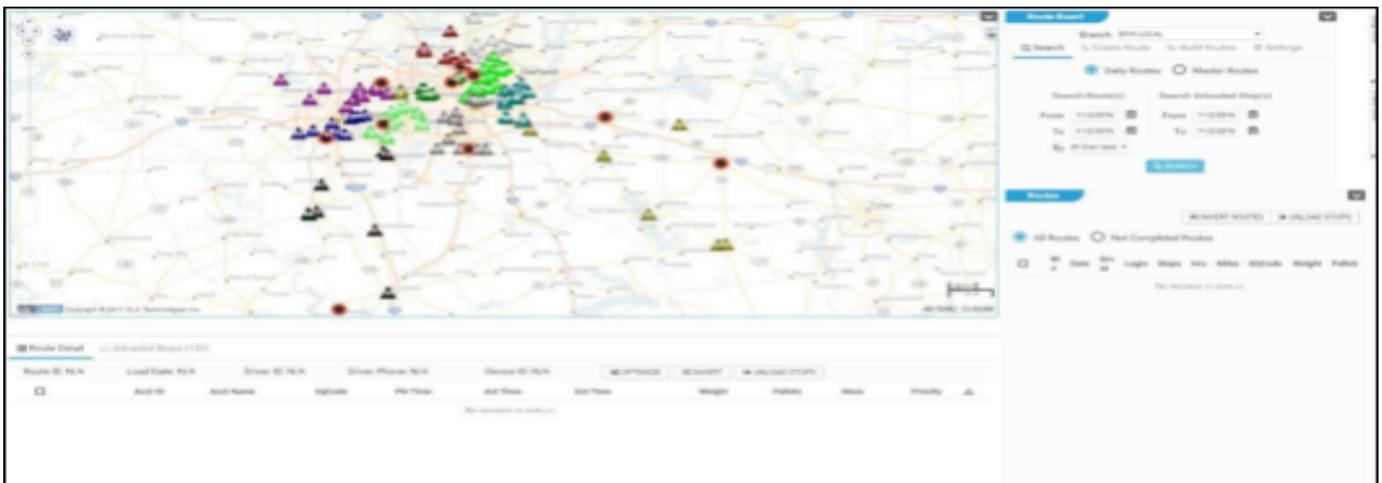


*Figure 33 — Empty Daily Routes (Route Board)*

To build a new route:

1. Select the *Build Routes* tab In the upper right hand corner of the *Route Board*
2. Edit *Build*: Branch (use the drop-down menu to locate), Dispatch date (use the calendar tool to change the date), and Profile(use the drop-down menu to select the vehicle profile)
3. Edit *Unloaded Orders*: Dispatch Start date/time and Dispatch End date/time, using the calendar tool to change the dates if necessary
4. Select Build Routes
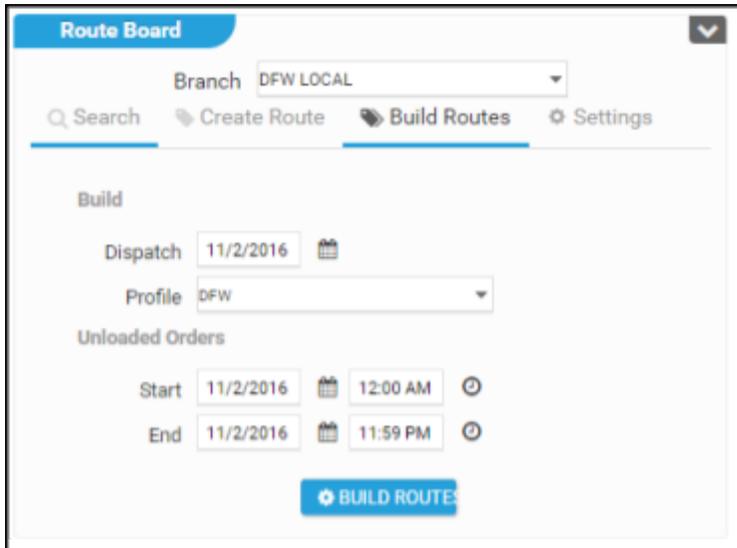
Figure 34 — Build Routes Tab
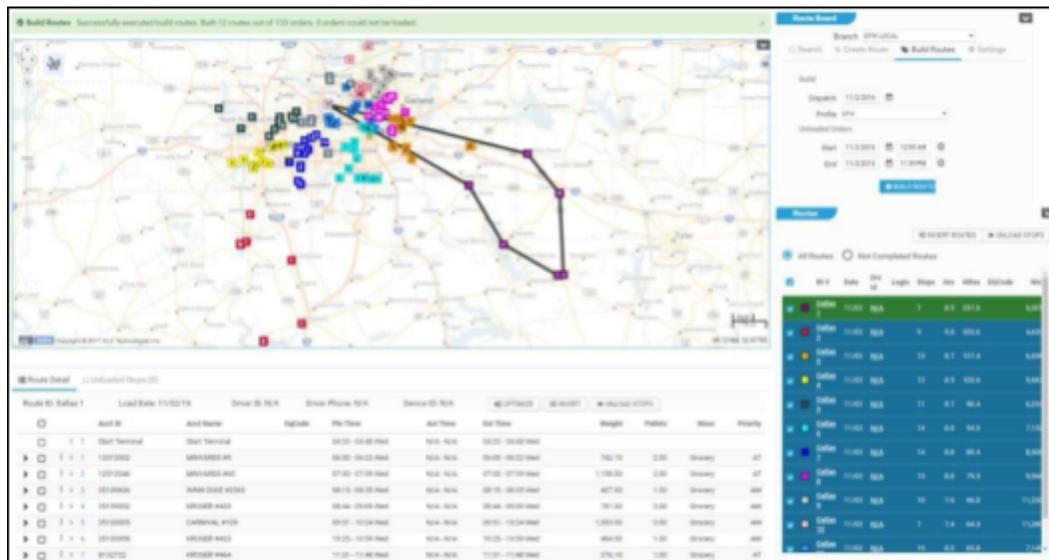


Figure 35 —  Build Routes Results

The newly built route will appear on the map and will be listed in the *Route Detail* list.

1.  To unload any stop, select the stop from the *Route Detail* list, then select *Unload Stops*

2.  To invert the new route, select *Invert Routes*

3.  To edit any other stop and/or route details, use the *Route Summary* page (*Dispatch > Routes)* page

## Route Calendar

The *Route Calendar* could be considered *Resource Centric*; it provides day/time views of your resource availability, providing the status of your resources as well as your deliveries with visibility throughout a day, week or month and across your entire organization.

The *Route Calendar* can be configured to display as much or as little detail as needed. You can change how items are grouped and displayed, what information is displayed, and add color coding to events and/or various resources.

Some of the actions that can be performed from the *Route Calendar* include

- Add an order to an existing route
- Load unloaded orders
- Move a route to another resource, or another day of the week
- Schedule resources for maintenance
- Create appointments
- Schedule driver PTO
- Build routes from Unloaded Orders using the drag and drop method
- Add driver breaks
- Geocode orders
- Assign Points of Interest (POI's)
- Export or print delivery sheets

To access the *Route Calendar*, select *Dispatch > Route Calendar* from the main menu.



*Figure 36—Route Calendar*

The following is a brief outline of what may be found, and where, on the *Route Calendar*.

- **Branch** (1) — A drop-down menu enables selection of any assigned branch (assigned by administrator)
- **Schedule Resource Type** (2) — Select which schedule type to display on the calendar (driver, truck, route, etc.) ; ref. to (5) below
- **Calendar Date** (3) — Select a date to view and plan; or select a week, month, or specific time-line to plan future periods of time; can also view any past period of time
- **Scheduled Resource** (4) — Each column is labeled based on the resource type selected (*Routes, Details, Drivers, Vehicles*); assignments for each will be listed in the appropriate time block when scheduled
- **Time of Day** (5) — Displayed for each day listed; choose the number of hours to display (work day, 24 HR, etc.)
- **Appointment Details** (6) — List the details for each resource scheduled; details vary based on the resource type (2) (ex. driver assignments may show vehicle# and order details, while vehicle assignments may show driver name, drive time/service time, etc.)
- **Orders and Routes** (7) — Bottom section of the *Route Calendar*
- **Unloaded Orders/ Route Details/ Unassigned Routes Tab** (8) — The *Unloaded Orders* tab will list each order that has not yet been loaded onto a route, the unload reasons, available drivers and assets (suggested resources), and enables drag/drop to load each order onto a route; the *Route Details Tab* displays more info about each stop/order that has been loaded onto a route; the *Unassigned Routes Tab* displays those routes that have not yet been assigned to a vehicle and/or driver
- **Action Menu** (9)—A list of actions available on this page, including *Save Changes, Refresh, Create Order*, and *Geocode Orders*.

Create a Route with a Reservation

1. Create a reservation on the Route Calendar page.
2. Create an Order and pass the Reservation ID using the Import Order Webservice call (This creates a Route with the Reservation).

**Empty Routes:**

- **REJECTED** — When users click *Delete* in the Scheduler UI, reservations are marked as *rejected* (not actually deleted), preserving the record in the database with audit and sending rejection notifications.
- **DELETED** — True deletion occurs only when routes are deleted, completely removing the reservation record from the database without updating the deleted column in the table.

# Routes

The *Routes* page provides the ability to view and/or edit current routes for any branch. To access the page, navigate to **Dispatch > Routes**. The default screen that appears will show all routes for all branches.
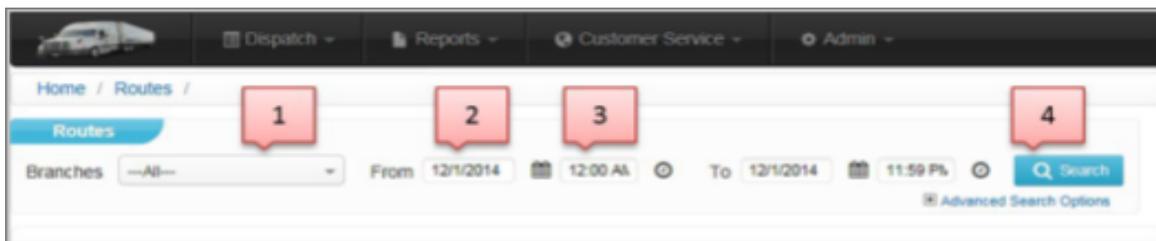


*Figure 37 — Routes Page Search*

1. Select the correct *BranchID* for the desired location.

2. Set the *From date* to the day routes are to be dispatched (default is the current date), and the *To Date* to the last day routes are to be dispatched (should be same as *From Date* unless routes are scheduled to leave after midnight)

3. Click the *Search* button



*Figure 38 — Routes Page*

## Route Summary

The *Route Summary* (*Dispatch > Routes)* displays a list of current routes in *Dispatch Routes*. The summary includes the information listed below, and can be viewed in an edit mode to allow for quick changes when necessary. Data can be sorted by selecting any of the column headers (ascending order).

- *Route #* — Select a route # to view the *Stop Summary* for that route

- *Branch* — Originating *BranchID* for the route

- *Device ID* — Used by the driver generating the tracking data for that route

- *Driver* — Select a driver name to edit/create a *Driver Login* for the specified route);hover the mouse over the name to view the *DriverID*

- *Login* — Color of the circle indicates the driver's status; green= logged in, red= not logged in, yellow= preassigned

- *Name* — Name assigned to the *DriverID*

- *Time* — Total work time for the route

- *Start Time* — Scheduled start or departure time for the truck

  - *End Time* — Scheduled route end time or return time of the truck

  - *Legs* — Section of the route displayed

  - *Stops* — Total number of stops on the route

  - *Miles* — Total miles of the route

  - *Last Position* — Last reported GPS position for the route, with time and date

  - **A** — Opens the *Planned Route Map Display* for the selected route

  -  — Indicates a *Time Window Violation* has or is projected to occur on the route

  -  — Indicates an arrival delay to the stop

- ▯ — Used to reverse the order of a route (select the icon to invert the route)
- ✉ — Indicates a message is attached to the route (select the icon to read the message)
- *More Action* — Select to display additional actions
- *Display Truck Info* — Select to view the *Truck Detail* screen
- *Invert Route* — This will cause the route to be run in a reverse order
- *Switch Route* — Switch selected route for another route within same branch
- *Edit Route Forms* — Update/edit any forms associated with this Branch

## Driver Pre-Assignment

When the pre-assigned driver logs into the route, the system will correlate the driver, truck, and device in order to display the appropriate GPS data for comparisons with the planned route. You can verify that a driver has been pre-assigned to a route by the values under *DeviceID*, *Driver*, and *Name*. (Refer to **Driver Login** for additional info)

A yellow circle in the *Login* column indicates the route has been *Pre-Assigned* to a driver. A green circle in the Login column indicates the route is currently logged into GPS tracking. A red circle indicates the route is logged out of GPS tracking and the GPS device can be assigned to another route.

| | | ROUTE # | BRANCH | DEVICEID | DRIVER | LOGIN | NAME | TIME | START | END | LEGS | STOPS | MILES | LAST POS. | MAP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ❯ | ☐ E | 401 | 101MI | 621246 | 67663 | ● | Darryl Landskroener | 11.8 | 04/02 04:00 | 04/02 15:49 | 1 | 0/0/5 | 073 | N/A | A |
| ❯ | ☐ E | 402 | 101MI | 107433 | 6934 | ● | Rob Sydor | 52.5 | 04/02 04:00 | 04/04 08:28 | 1 | 0/0/6 | 096 | N/A | A |
| ❯ | ☐ E | 403 | 101MI | 682268 | 88705 | ● | Donald Farmer | 36.8 | 04/02 04:00 | 04/03 16:49 | 1 | 0/0/5 | 108 | N/A | A |
| ❯ | ☐ E | 404 | 101MI | 621247 | 62969 | ● | Cory Kirkland | 11.2 | 04/02 04:00 | 04/02 15:11 | 1 | 0/0/5 | 094 | N/A | A |
| ❯ | ☐ E | 405 | 101MI | 682266 | 64664 | ● | Marcus Crawford | 24.0 | 04/02 22:00 | 04/03 21:58 | 1 | 0/0/13 | 404 | N/A | A |
| ❯ | ☐ E | 406 | 101MI | 621248 | 7234 | ● | Russ Williams | 12.2 | 04/02 04:00 | 04/02 16:10 | 1 | 0/0/6 | 133 | N/A | A |
| ❯ | ☐ E | 407 | 101MI | 666261 | 90790 | ● | Jamar Ross | 21.1 | 04/02 05:00 | 04/03 02:03 | 1 | 0/0/8 | 379 | N/A | A |
| ❯ | ☐ E | 408 | 101MI | 666262 | 7719 | ● | Don Wilber | 21.7 | 04/02 04:00 | 04/03 01:39 | 1 | 0/0/8 | 576 | N/A | A |

*Figure 39 — Driver Pre-Assignment*

To change a driver pre-assignment:

1. Click on the blue entry under the *Driver* column for the route you wish to change; this will open the *Manual Login* box
2. Select *Remove Preassignment* to remove the currently assigned driver
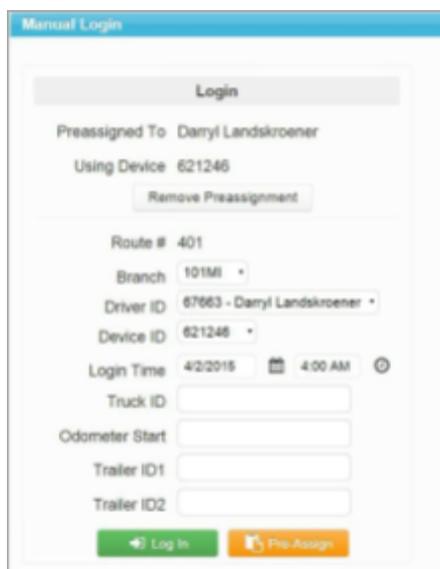
*Figure 40 — Manual Driver Login*

The *Manual Login* box will close and the routes list with reflect *N/A* for the record that was just updated.



*Figure 41 — Driver Pre-Assignment Removed*

1.  Click on the *N/A* to reopen to the *Manual Login* box
2.  From the *DriverID* drop-down list, select the desired driver for the route.
3.  Select the *DeviceID* from the drop down list if necessary.
4.  Enter the name or number of the truck being assigned in the *TruckID* field, or just enter the *DeviceID* again.
5.  Once the entries are complete, select *Pre-Assign* (you can also manually login the driver by selecting the green Log In button)

## Edit Routes

Most route data can be edited from the *Route Summary* page.

To change the *Start* or *Stop Time*:
1.  Select *Edit Mode* from the upper right corner of the page
2.  Place a check in the box adjacent the route and edit *Start/End Date* and/or *Start/End Time*
3.  When complete, select *Reschedule* for a date change, or *Change Start Time* for a time change

Inverting routes will reverse the order of the planned stops. To invert a route:
1.  Select *Edit Mode* from the upper right corner of the page
2.  Place a check in the box adjacent the routes to invert
3.  Select *Invert*

## Stop Summary

The *Stop Summary* is a summary view of all stops assigned to any particular route. When viewing the stops, they can be sorted by *Stop*, *Order#* or *Line Items*. To change the view and/or sort option, select the header column or select the *View By* drop-down arrow.

To view a *Stop Summary*, navigate to *Dispatch > Routes*.

1.  Select a *Route#* from the column to view the *Stop Summary* for that route

2.  To view an *Order Detail Summary* (*Details*) for any stop, select the *OrderID*, or select the *Sequence#* (*SEQ*)



*Figure 42—Stop Summary*



*Figure 43 — Order Details Summary*

## Order Details

- *Order Info*—Info includes *Branch, Route, OrderID, Estimated Delivery Date*, etc.
- *Account Information*—*AccountID, Account Name, Contact Info*, *Ship* and *Billing Address*
- *Arrival/Departure* —Indicates the planned, estimated, and actual arrival/departure times
- *Time Speed Adjustment*—Indicates the AM and PM *Start/End Adjustment* times and amount
- *Delivery Time Windows*—Authorized times when orders can be received at delivery location
- *Qty Fields*—Quantity values for all orders associated with the stop
- *User Fields*—Displays any configured *User Field* and corresponding values, when used

## Edit Arrival/Departure

From the *Stop Summary* page, select the *Edit Mode* button.

1. Place a check in the box adjacent to the stop
2. Edit dates/times as necessary
3. Select *Save Changes*

## Move Stop

From the *Stop Summary* page, place a check in the box adjacent the stop you want to move.

1. Select Move Stop
2. If moving to another route, select the new route number from the drop-down box
3. Edit Leg and Seq
4. Select the Move Stops button



*Figure 44 — Move Stops*

## Unload a Stop

From the *Stop Summary* page, select the stop by placing a check in the box adjacent to the stop.

1. Select Unload Stop
2. Select OK to confirm the unload, or Cancel to cancel the action
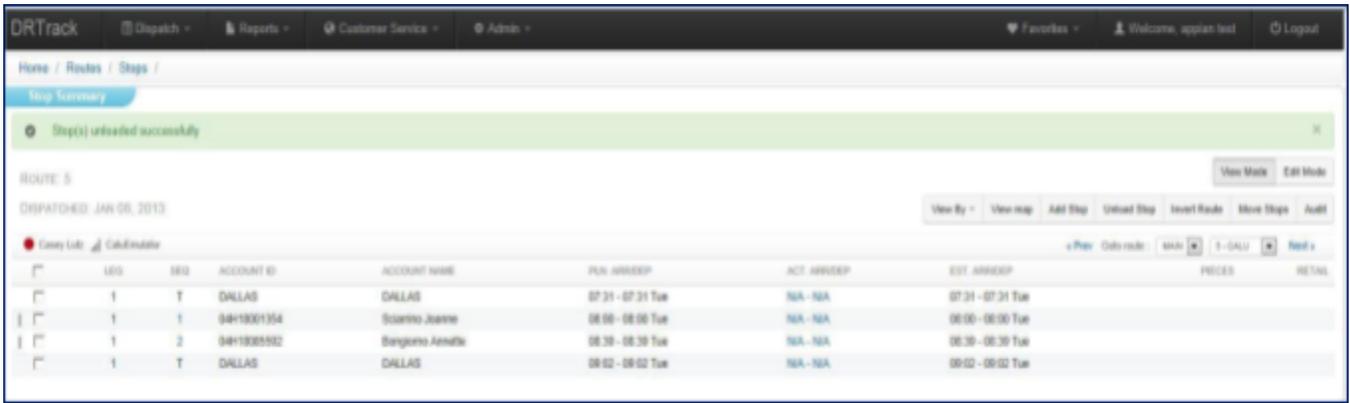
*Figure 45 — Unload Confirmation*

## Add a Stop

From the *Stop Summary*, select *Add Stop*.

1. If the stop is not displayed in the *Unloaded Stops* list, conduct a search using the search options

2. Place a check in the box adjacent the stop to add

3. Select *Next Step*

4. Edit the *Leg/Sequence* numbers to place the stop

5. Select *Finish*
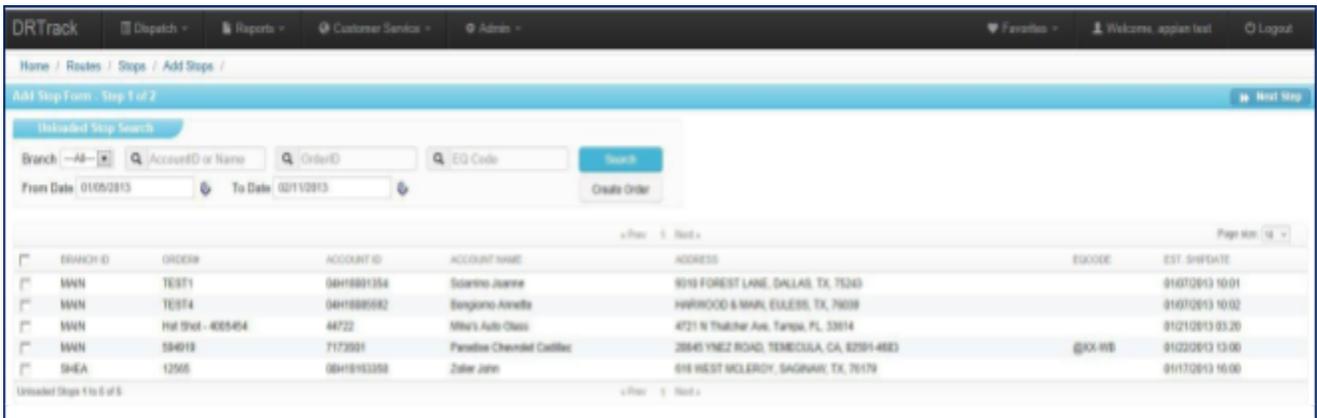


*Figure 46 — Add a Stop*
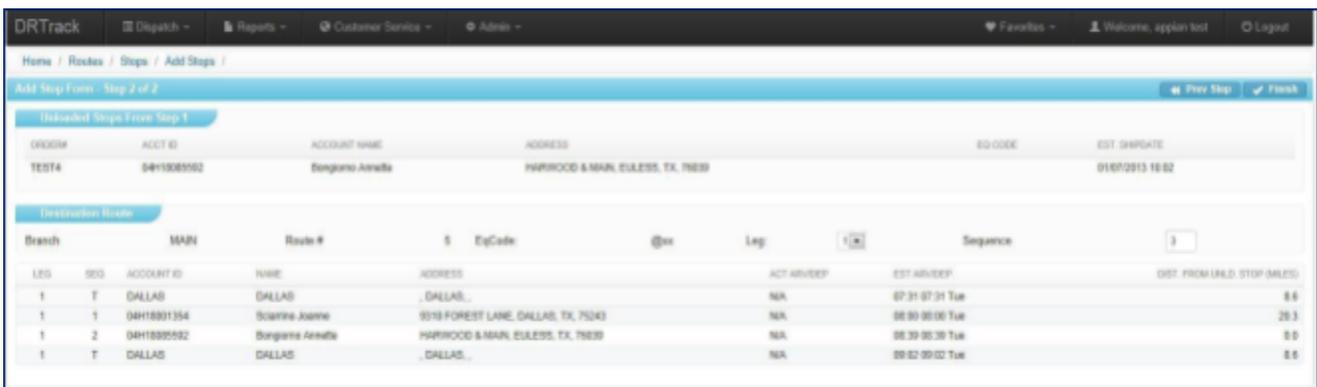


*Figure 47 — Edit Leg/Sequence Number*

## Route Map

Map views for each route can be accessed by clicking on the map icon ![icon] adjacent to any route. The map displays the actual stop locations, planned route, and last reported location for a selected route (GPS history).

Below the map is a list of all the planned and/or completed stops for that route. To the right of the map is *Route Map* info box that can be used to select and view additional routes and/or stops; use the drop- down arrow to change the dock location of this info box between the left and right side of the screen, and/or minimize the box.
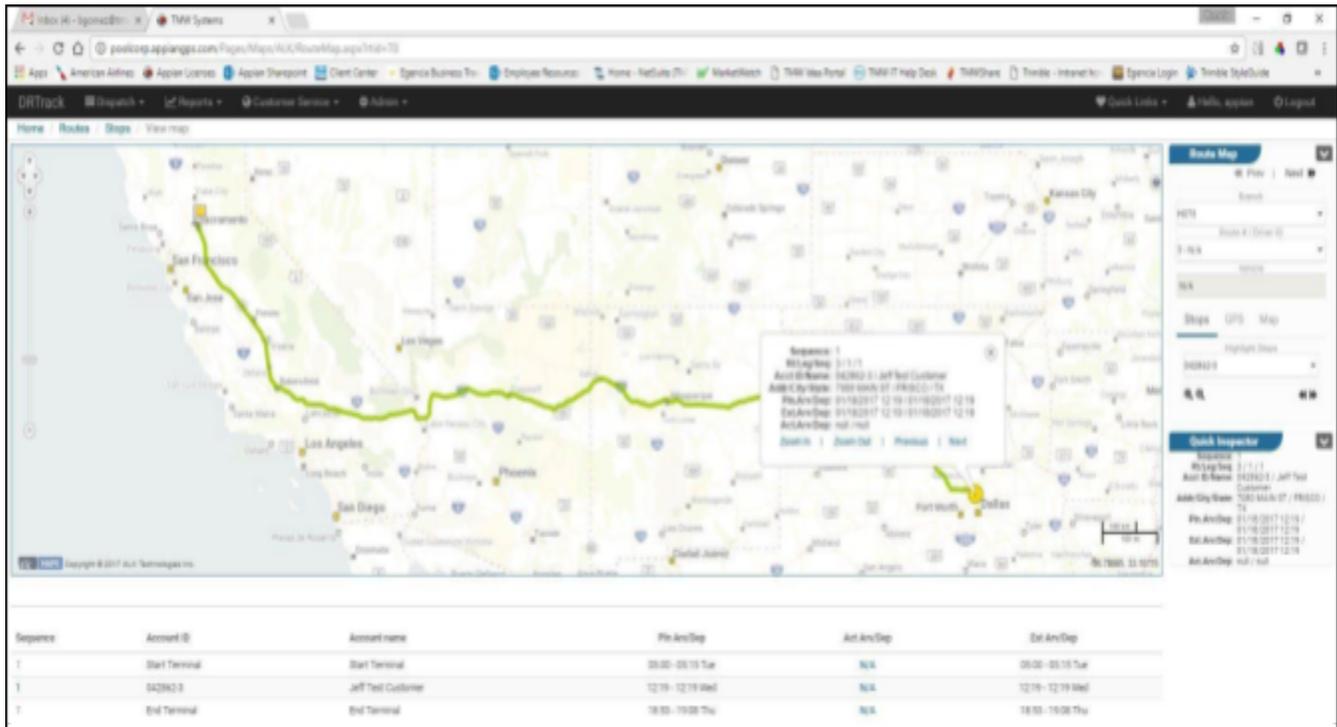


*Figure 48 — Map View of Planned Routes*

Use the *Route Map* info box to navigate and/or view specific route and/or stop info.

- *Previous/ Next Arrows* — Move between stops on the map display area
- *Branch* — Select any branch from the drop-down menu to view available routes/drivers/stops
- *Route#/ Driver ID* — Select any route#/driver from the drop-down menu
- *Vehicle* — Provides a drop-down menu of all vehicles for the branch/routes selected
- *Stops/ Highlight Stops* — Provides a drop-down menu of all stops in routed sequence order; select any stop to center it on the map and open the stop info box
- *GPS/ Show GPS Points* — Select the GPS tab in the *Route Map* indicator box and place a check mark in *Show GPS Points* box to display a trail of actual GPS tracking points
- *GPS/ Speed Violation* — *Highlight GPS Points* will highlight these points on the map for any devices that read a speed greater than the input amount (default set to 50 or zero)
- Select *Set Speed Violation* and *GPS points* that were captured when speed was exceeded will be circled in red
- *Map* — Provides the legend of markers displayed on the map

Figure 49 — Show GPS Points
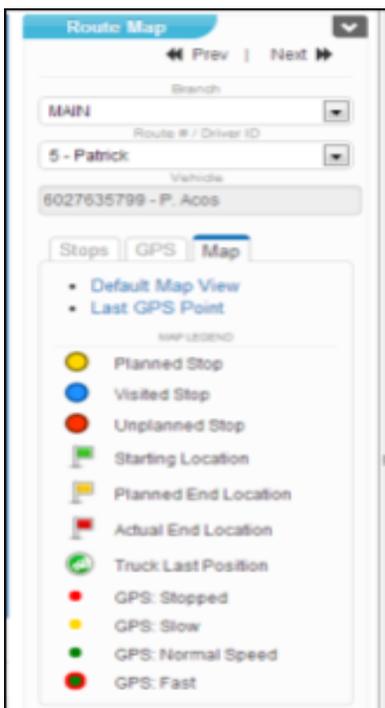


Figure 50 — Map Markers

*Map Markers* will open the info box for that marker location and display the following:

- *Route/Leg/Sequence*—Includes Route #, Leg #, and planned stop sequence
- *Account ID/Name*—Planned stop
- *Address/City/State*—Account address

- *Planned Arrival/Departure Time*—For the stop

- *Estimated Arrival/Departure Time*—Based on current progress of the route

- *Actual Arrival/Departure Time*—As reported by the GPS tracking data (all times are updated throughout the day as arrivals/departures are completed)
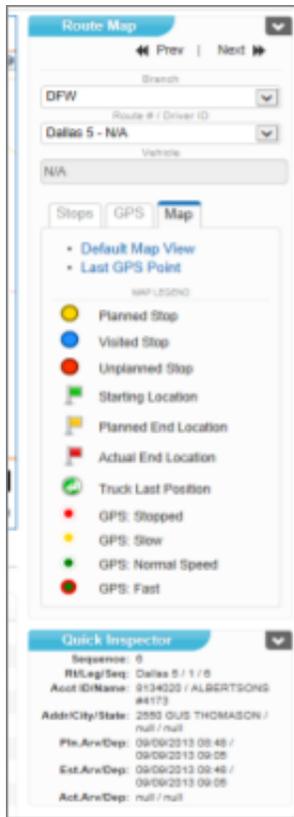


*Figure 51 — Quick Inspector Box*

The *Quick Inspector* box will also populate with the same marker info when the marker info box is open. This box is normally located below the *Route Map* tab, on the right side of the screen, but can be moved/docked elsewhere on the screen to customize the viewing area.

## Unloaded Orders

Any order created through the **Create Orders** process will be an unloaded order until it is loaded on a route. You can search for, geocode, and/or delete any unloaded order outside of the routing process in DRTrack.

Enter the search criteria.

1.  Use any or all of *Branch, AccountID*, *Name, OrderID* and *From/To* dates

2.  Include *Geocode Type* (all or un-geocoded) if desired

3.  If more than one order is returned in the search results, select the affected order by placing a check mark in the box adjacent to the order

4.  To *Geocode* or *Delete* the order, select the corresponding button

If no results are returned, an order can be created by selecting *Create Order.*

## Search Unloaded Stops

Enter the search criteria.

1. *From/To dates, Account Name* and/or *ID*, etc.

2. Select *Search* to display results

3. To edit the unloaded order, select the order # under the *Order Number* column
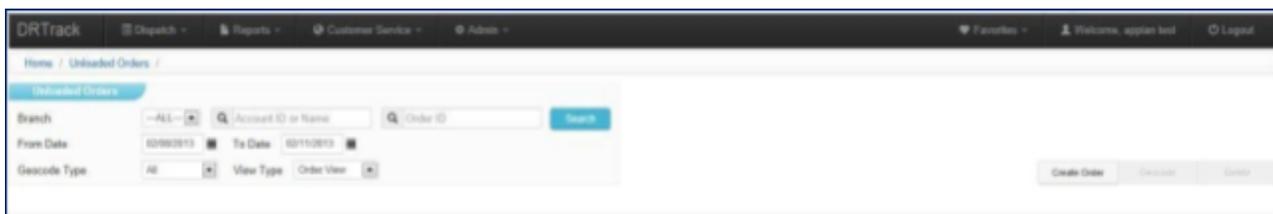


*Figure 52 — Search Unloaded Orders*

# Reports Tab

DRTrack Reports are accessible from the Reports tab on the Main menu. The types of reports available to view and/or download are dependent on your individual access level and assigned *User Group.* Many of the reports can be tailored to include/exclude specific data fields and time periods (1 week, 30 days, etc.).

Listed below are some of the common reports available. Contact your Site Administrator with any questions regarding access to specific reports or requests for additional or custom reports.
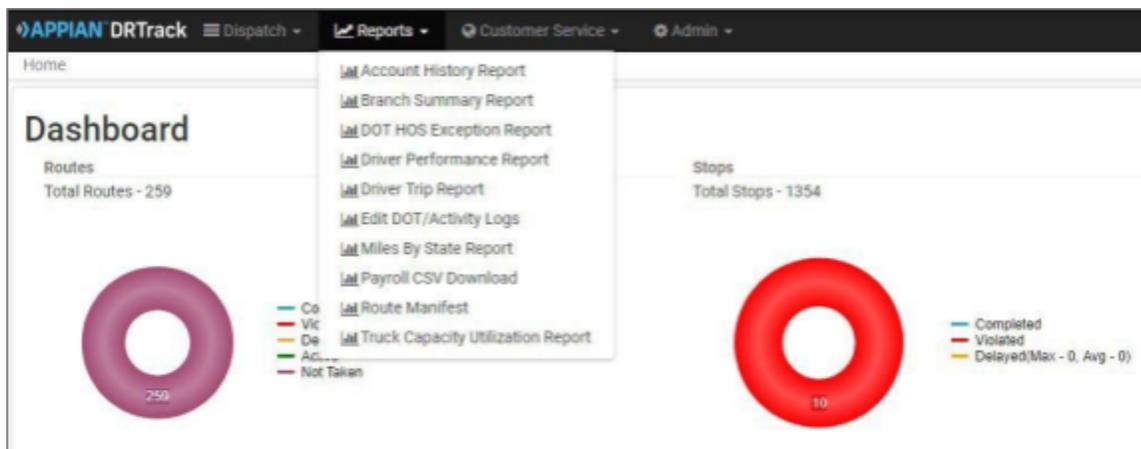


*Figure 53 — DRTrack Reports*

*Account History* — Route history for specified accounts and/or branches within a range of dates
*Branch Summary* — Total number of routes, stops and orders by day; includes *Actual* vs. *Planned Duration* **and** *Distance*

*DOT HOS Exception* — Provides a view of weekly and daily HOS times and violations for drivers

*Driver Performance* — Analysis of driver performance (*Total Hours, Mileage, Service,* and *Drive Times*)
*Driver Trip Report* — Analysis of driver performance by stops on a route; includes unplanned stops *DOT Activity Logs* — Activity reports for specific branches, trucks, and drivers, by date or time.

*Miles by State* — Summary of miles driven per state by driver, truck, or branch (Fleet Summary also indicates when state borders have been crossed)

*Payroll CSV Download* — Report of all Driver-related activities and events for a desired date range. Available to view or download

*Route Manifest* — Provides detailed route info for the selected branch and dispatch date, including actual stop arrival/departure times as indicated by GPS activity

*Scorecard Report* — Report that evaluates planned vs actual information by branch by route and displays the variance.

*Time Analysis Report* — Summarizes all visits to accounts for a specific time frame and gives statistics on the min, max and average time your drivers spent at locations to help make dwell time more accurate during planning

*Truck Capability Utilization* — Downloadable capacity utilization (at truck level) by branch (daily, weekly, monthly, quarterly, or yearly)

## Account History Report

This report provides a snapshot of the route history for specified accounts and/or branches, for a specified period of time (date range). It includes total number of deliveries, number of orders, volumes delivered, on-time rate, and violations. Formats: Web, XML, CSV, PDF, MHTML, Excel, TIFF, Word.

To run the *Account History Report*:

1. Select the *Branch(es)* and *From/To* dates

2. Select how the data should be grouped (week, month, year, etc.)

3. Determine if data should be subtotaled

4. Select specific accounts or leave blank for all (Branch)

5. Select the *Quantity Fields* to report

6. Enter any display limits (deliveries) in results, if needed (*Display # delv between 1 and 9999*)

7. Select *True/False* to *Display Subtotal* (if reporting on multiple branches)

8. Click *View Report*



*Figure 54 — Account History Report*

On-time rates and quantities delivered are included in the results.

- *> 30* — Serviced more than 30 min. past planned arrival time
- *> 60* — Serviced more than 60 min. past planned arrival time
- *> 90* — Serviced more than 90 min. past planned arrival time
- *On Time Del* — Serviced within 5 min. of planned delivery time
- *Gallon Equivalents* — Total delivered during the reporting period
- *Order Weight* — Total delivered during the reporting period

## Branch Summary Report

The *Branch Summary Report* Provides the total number of routes, stops and orders per branch by day, and includes *Actual* vs. *Planned* duration and distance. This report is available in multiple formats (XML, CSV, PDF, MHTML, Excel, TIFF, Word).

To run the *Branch Summary Report*,

1. Select the *Branch* or *Branches,* and *From/To* dates (date range)
2. Select *Group By* (week, month, and year, etc.) and *Display Subtotal* (if reporting on multiple branches)
3. Click *View Report*



*Figure 55 — Branch Summary Report*

The following fields are included in the report results.

- *Pln. Duration* — Planned time of combined routes during the report period
- *Actual Duration* — Actual time spent to execute the routes during the report period
- *Pln. Distance* — Planned miles of the combined routes during the report period
- *Actual Distance* — Actual miles traveled executing the combined routes during the report period

## DOT HOS Exception Report

The *DOT HOS Exception Report* provides a view of weekly and daily HOS times and violations for drivers.
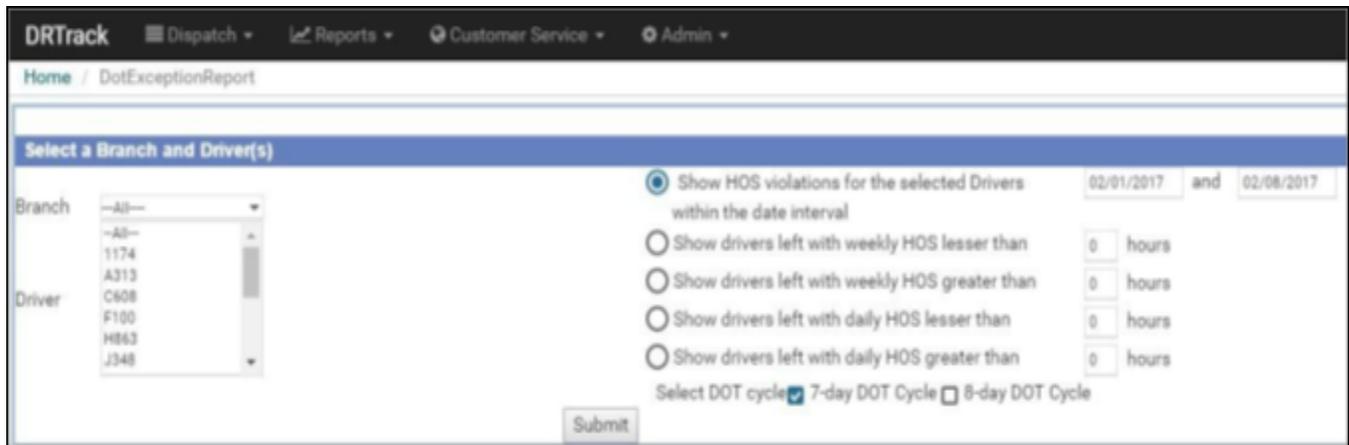
*Figure 56 — DOT Exception Report*

To retrieve the *DOT HOS Exception Report,*

1. Select the *Branch* or *Branches,* and/or *Driver*
2. Select the type of Driver data to retrieve, and the reporting cycle
3. Click *Submit*

## Driver Performance Report

The *Driver Performance Report* is an analysis of how well the driver is performing, based on *Total Hours, Service Time, Drive Time* and *Mileage.*

To retrieve the *Driver Performance Report:*

1. Select the *From/To* dates and *Type* (daily, weekly, and monthly, etc.)
2. Select the *Branch* or *Branches,* and/or *Driver*
3. Click *Submit*
4. Download a copy of the report by selecting the *Download* button
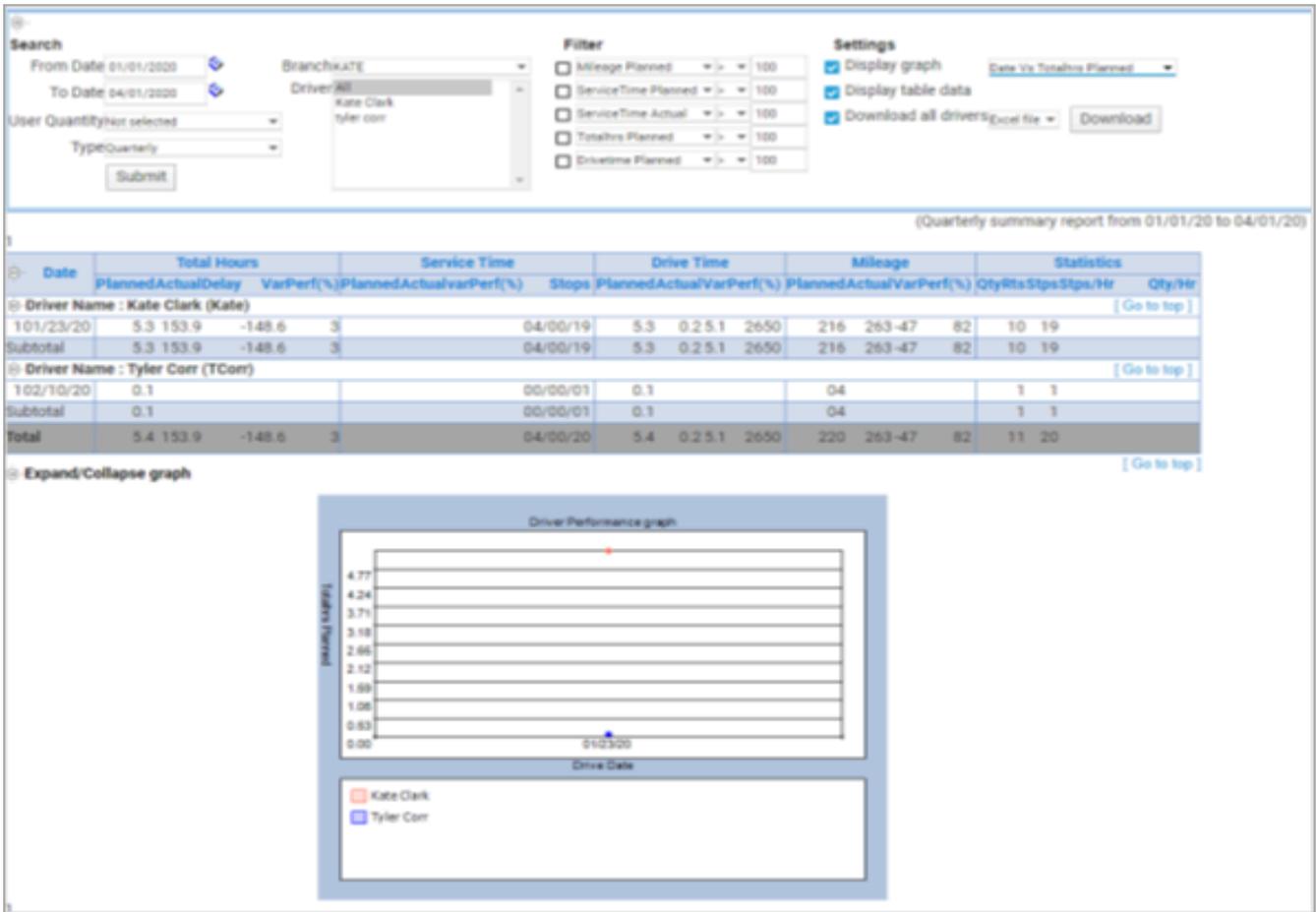
*Figure 57 — Driver Performance Report*

## Driver Trip Report

The *Driver Trip Report* is an analysis of how well a driver performs his route on a stop by stop basis, including unplanned stops. The report results can be sorted, which is helpful when running the report for more than one driver (i.e. by Branch).

To retrieve the *Driver Trip Report,*

1. Select the *Branch* or *Branches,* and/or *Driver*

2. Select the *From/To* dates

3. Click *Submit*

4. Download a copy of the report by selecting the *Download* button
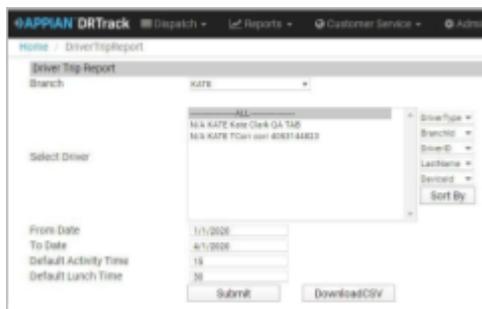


*Figure 58 — Driver Trip Report*

*Figure 59 — Driver Trip Report Results*

A Stop Summary for any of the listed stops can be viewed by selecting the *View Stop Summary* button, and/or view a map with the stop on it by selecting the *View Map* button.

Route activity can also be updated to correct any information by selecting the *Edit Route Activity* button.

## DOT/Activity Logs

The *DOT/Activity Logs* can be run for specific *Branches, Trucks*, and/or *Drivers* for specific dates or time periods. The logs can be edited to add missing routes, delete unfulfilled routes, or edit route data that is incomplete or incorrect.



*Figure 60 — DOT/Activity Log*

To retrieve a *DOT/Activity Log,*

1. Select Branch or Branches

2. Select a Driver and/or Truck, or ALL

3. Edit the From/To Dates (time period to see on the log)

4. Click Submit

To edit existing route data or to add a new route to a driver,

1. Identify the *TruckID* on the DOT/Activity Log that is associated with the route and/or driver, then select the *TruckID* from the *Truck* drop down menu

2. Click the *Submit* button



*Figure 61 — DOT/Activity Log Results*

To edit or delete existing route data, select the *Activity* box that applies to the change being recorded, and edit each block of data that applies. Click the *Modify* button when complete, or the *Delete* button if the route is being deleted.



*Figure 62 — Edit DOT/Activity Log*

To add new route data, complete the *Arrival* activity register to include the route *Start Time* and *End Time*, *Date, Odometer* reading, and quantities picked up/delivered.

| Activity | Date | Start Time | End Time | AcctID/Name /Gallons /Odometer | Delivered/Qty/State | Pickup | Missing |
|---|---|---|---|---|---|---|---|
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |
| ☐ Arrival ▼ | 2/7/2020 | | | | | | |

*Figure 63 — Add New Routes to DOT/Activity Log*

## Miles By State Report

The *Miles by State Report* includes the total number of miles driven per state and indicates when state borders have been crossed. This summary report can be limited to a specific *Truck/Driver*, *Branch* or *Branches,* or a whole Fleet, and the reporting period defined.

To request a report:

1. Select the *Branch* or *Branches,* or *All*

2. Select *Driver/Truck*, or *All*

3. Edit the search dates (*From* date and *To* date)

4. Click the *Submit* button

5. Download a copy of the report by selecting the *Download* button



*Figure 64 — Miles by State Report Request*
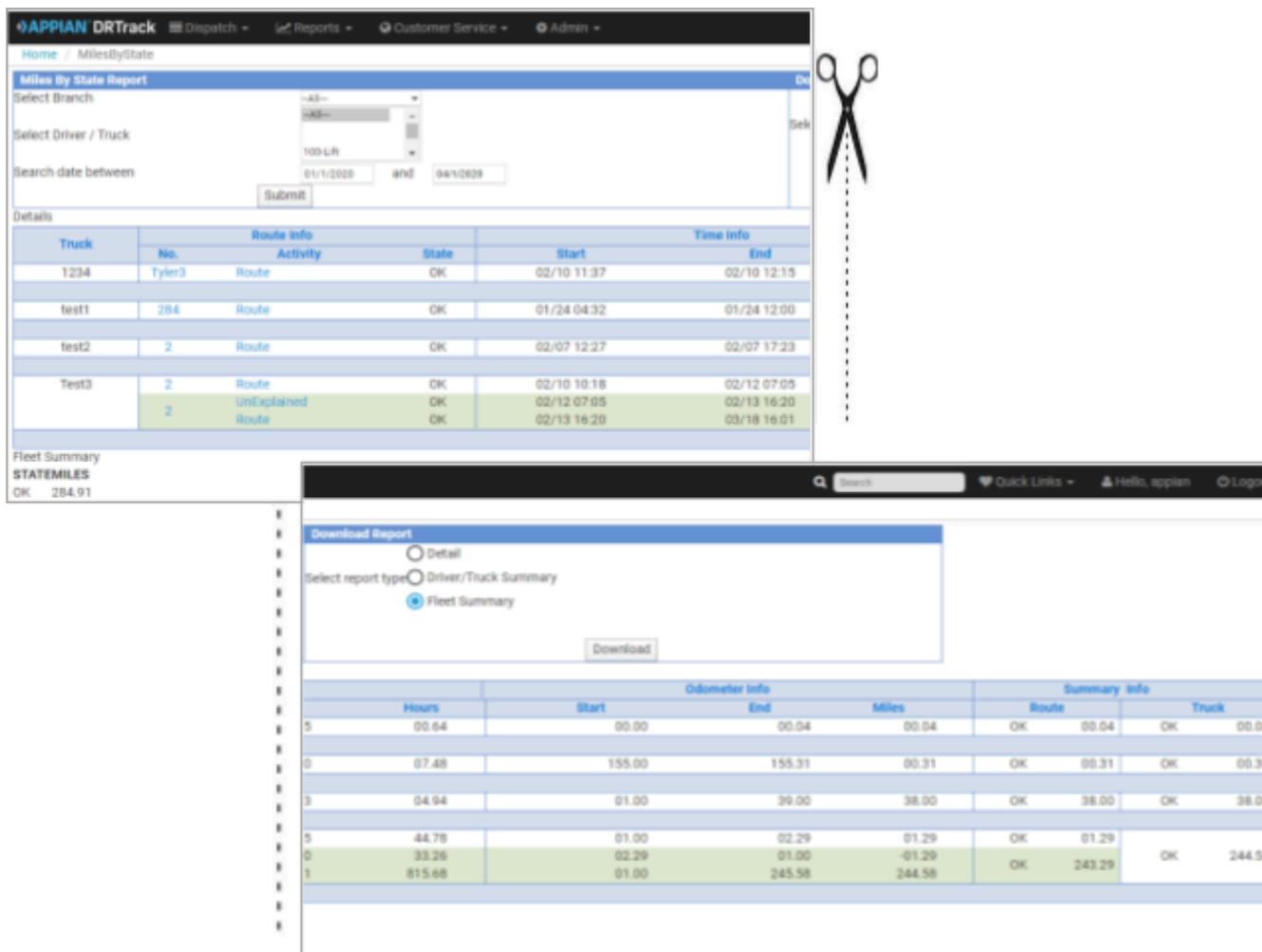
*Figure 65 — Miles by State Summary Report*

## Payroll CSV Report

Report of all Driver-related activities and events for a desired date range. Available to view or download

## Route Manifest

The *Route Manifest* provides detailed route info for the selected branch and dispatch date, including actual *Stop Arrival* and *Departure* times as indicated by GPS activity. This report is also available in multiple formats (web, XML, CSV, PDF, HTML, Excel, TIFF, Word).

To retrieve a *Route Manifest*,

1. Select Branch or Branches, and Dispatch Date

2. Select View By (Stops, Orders, Line Items) and Display Actuals

3. FALSE will only show the Planned Stop Times for dispatch purposes

4. TRUE will show the Actuals as a Post Route Review

5. Select Specific Route when a full report of all routes is NOT wanted

6. Click View Report

*Figure 66 — Route Manifest Report*

## Scorecard Report

Report that evaluates planned vs actual information by branch by route and displays the variance.

## Time Analysis Report

Analyzes planned stop times vs actual stop times.

## Truck Capacity Utilization Report

The *Truck Capacity Utilization Report* provides a capacity utilization report by branch at the truck level. It can be retrieved for specific periods of time (daily, weekly, monthly, etc.) and is available in multiple formats (Web, XML, CSV, PDF, MHTML, Excel, TIFF, Word).

To run the *Truck Capacity Utilization Report:*
- Select the *Branch* and/or *Branches*, and *From/To* dates
- Select *Group By* (day, week, month, etc.)
- Specify Route number, Truck ID, and Quantities 1 & 2 (optional)
- Click *View Report*

| | | | | Truck Capacity Utilization Report for Branch 124-LEB | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| RT# | Truck ID | Driver | Start Period | Tot. Stops | Tot. Mil. | Act. Mil. | Gallon Equivalents | Qty1(%) | Order Weight | Qty2(%) | Max |
| 124-LEB1009-M | 1009-M | Glendon, Ebersole | 10/03/2016 | 10 | 256 | 226 | 1165.58 | 45.0% | 10487.64 | 42.6% | 45.0% |
| 124-LEB1012-M | 1012-M | Gregory, Mader | 10/03/2016 | 6 | 78 | 81 | 5156.55 | 119.4% | 49918.08 | 129.7% | 129.7% |
| 124-LEB1014-M | 1014-M | Thomas, Summerfield | 10/03/2016 | 7 | 187 | 187 | 2495.51 | 70.9% | 23626.38 | 61.4% | 70.9% |
| 124-LEB1017-M | 1017-M | Greg, Kreiser | 10/03/2016 | 8 | 87 | 82 | 5466.29 | 126.5% | 52804.22 | 137.2% | 137.2% |
| 124-LEB1018-M | 1018-M | Manuel, Peguero | 10/03/2016 | 5 | 126 | 141 | 143.29 | 3.3% | 1269.20 | 3.3% | 3.3% |

Figure 67 — Truck Capacity Report

Some of the fields displayed in this report include

- *Tot. Stops*—Number of stops on the route
- *Tot. Mil.*—Planned Miles for the Route
- *Act. Mil.*—Actual miles for the route according to logs
- *Gallon Equivalents*—Total Gallon Equivalents the vehicle delivered
- *Qty 1 (%)*—Capacity Utilization based on the first capacity
- *Order Weight*—Total Order Weight the vehicle delivered
- *Qty 2 (%)*—Capacity Utilization based on the second capacity
- *Max*—the highest Capacity Utilization of the vehicle during that date range

# Customer Service Tab

The *Customer Service* tab was designed to be used by your end customers, Sales, or Customer Support or Transportation; anyone assigned in the Customer Support role. This section provides access to real-time delivery ETAs on routes in progress from any browser, smart phone or tablet.
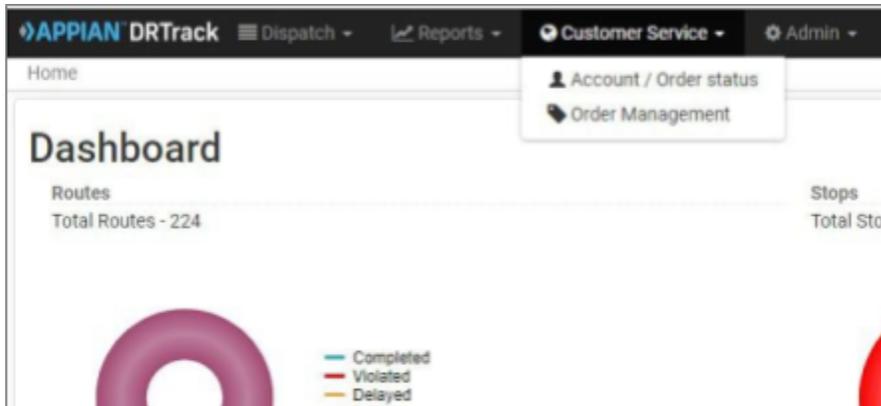


Figure 68 — Customer Service

## Account/Order Status

Customers can check the status of any current order, limited to accounts assigned to their company only. A simple search can be performed by *Order Number* or by *AccountID*, with additional date filtering capabilities.

Customers do not have any edit capabilities on this screen.



*Figure 69 — Account/Order Status Search*



*Figure 70 — Account/Order Status Search Result*

## Order Management

Customers can edit their *Daily Orders*, or maintain their *Master Orders* from this screen, limited to accounts assigned to their company only.

A search for orders can be performed for either *Daily Orders* or *Master Orders*, by *Branch* using filters for *Date Range, Account Name, AccountID*, *Order Number,* and the *Address*. Search results can be limited to *Time Violations, Completed Stops*, or filtered by *Date* and *Time*.



*Figure 70 — Order Management*

# Admin Tab

The *Admin* tab provides access to areas frequented by managers to maintain and monitor administration actions within DRTrack. Access levels within this tab can vary among *User Groups*, and are controlled by your Site Administrator.

*Banner Manager* — Add, edit or delete a banner.

*Branch Manager* — Can add, edit or delete branches; create branch groups and dispatch groups.

*Audit* — Audit accounts, orders, routes and tasks.

*Customers* — Manage accounts, email notifications, POI Manager and *Ship To* addresses.

*Dispatch* — Manage devices, drivers and forms.

*Routing* — Manage algorithm settings, routes, EqCodes, Master Routes, trucks and unlock orders.

*Site* — Licensing, modules, settings & configurations, tasks, Users and User Groups, and permissions.

*Utilities* — Cost Savings Statistics.
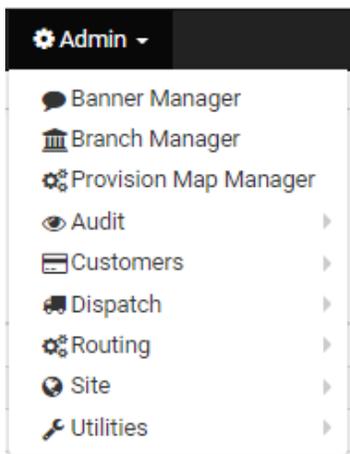


*Figure 72 — Admin Tab*

## Banner Manager

Banner Manager provides a means to add a message banner that would appear across the screens of DRTrack users within your organization. The same banner will appear at the top of every screen page.
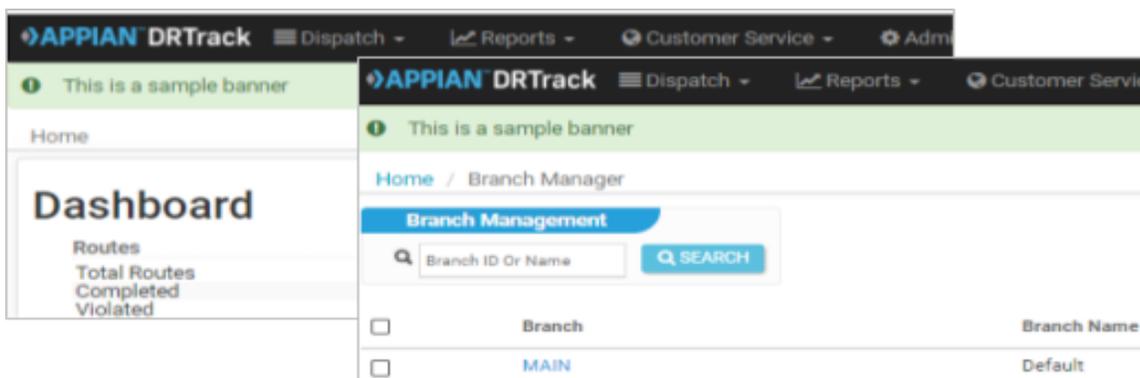


*Figure 73 — Message Banner*

To add a banner, go to *Admin > Banner Manager*.

- Click on the *Add Banner* button.
- Create a name (Title) for the banner and enter the words you want to display in the banner.
- You can choose an icon (exclamation, warning, info, etc.) to display with the banner or not.
- Select a warning level (color) for the banner; error= pink, success = green, info = blue.

Once created, banners will be listed on the Banner Manager page.

- To make a banner active, click the box on the right under *Set Active* and then confirm.
- To edit a banner, click on the name of the banner; perform the edits and then click *Save Banner*.
- To delete a banner, click the box to the right of the banner title, click on the *Delete Banner* button and then confirm.



*Figure 74 — Banner Options*

## Branch Manager

Branches must be set up for order detail to flow from the backend system to DRTrack. By default, any route that is not assigned to a specific branch code will be placed in the Branch code *MAIN*.

To create a branch, navigate to *Admin > Branch Manager*.



*Figure 75 — Branch Set Up*

### Add or Edit Branches

To add a new branch, select *Add New* and complete all required fields.

1. Add the new branch to the active branch list for each user requiring access to new branch
2. To edit an existing *Branch ID*, select the branch name in the *Branch* column or use the search function to locate the branch; click on the BranchID to open and edit

3. To delete a branch, select the branch by checking the box to the left of the *Branch* column on the *Branch Management* page, then select *Delete*



*Figure 76 — Add New Branch*

To edit an existing Branch ID, locate the Branch name in the Branch column or use the search function to locate the branch.

1. Select the Branch to open the data info box and edit the necessary branch information

2. To add a new Branch, select *Add New* and enter all necessary information, then select *Save*

3. To delete a Branch, select the Branch ID and then select *Delete*

4. Select *Save* when all editing is complete

> Note: Once a branch is set up, add it to the active branch list for each user. This must be done to enable export of route info from DirectRoute to DRTrack. By default, any route that is not assigned to a specific Branch code will be placed in the Branch code MAIN.

## Create a Branch Group

Branches can also be formed into groups, much like a *User Group*. This can be helpful when several branches are typically dispatched at the same time, or to send notifications.

To create a group, select the *Branch Groups* button on the right side of the screen.



*Figure 77 — Create a Branch Group*

Type the name of the new group in the *Branch Group Name* box, then select the *Add New* button.

1. To edit group members, click on the Branch Group name

2. Select branches from the column on the left (*Available*) then click the arrow in the middle to send the name to the column on the right (*In Group*)

3. After all desired branches have been added to the group, select the *Save* button to commit the changes
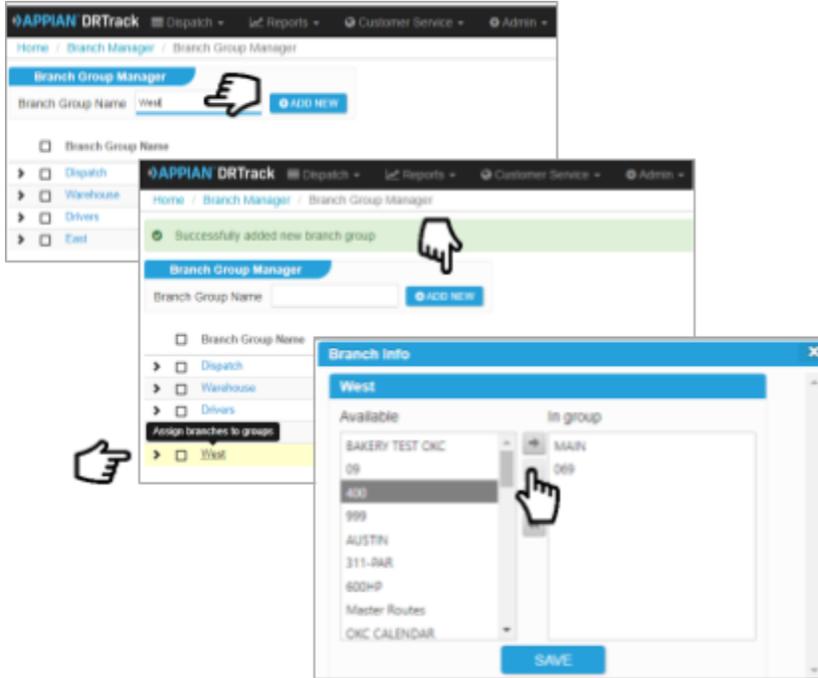


*Figure 78 — Branch Groups*

## Create a Dispatch Group (Add/Delete)

The use of Dispatch groups was created to enable grouping asset records (as Trucks or Drivers) within a branch, to expedite record search and record retrieval time in branches that contain an extremely high number of records. These Dispatch Groups are only used and/or seen when using the Route Calendar.

1. To set up a new Dispatch Group, select *Admin- > Branch Manager*.

2. Select the *+ Add New* button on the top right of the screen.



*Figure 79 — Add New Dispatch Group 1*

3. Or, select the *Dispatch Groups* button on the top right of the screen, and then the *+Add* button on the following screen.

*Figure 80 — Add New Dispatch Group 2*

**4.** Assign a name to the new group and select the appropriate branch to which the new group will be assigned. Select the *+Add* button when done.



*Figure 81 — Dispatch Group Name*

(Note: Dispatch Groups can be deleted by using the same procedures.)

**5.** Click the boxes to the left of the Drivers and Assets (Trucks) to include in the new Dispatch Group; select the Save button when done.



*Figure 82 — Edit Dispatch Group*

To view/select any Dispatch Groups from the Route Calendar, select the Branch drop-down menu.
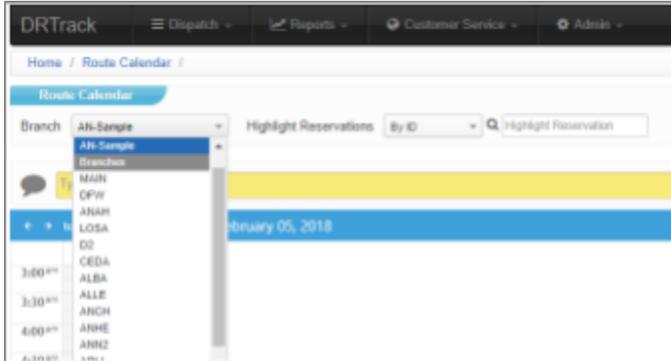


*Figure 83 — Edit Dispatch Group*

# Email Manager

Email Manager provides the means to manage all email addresses maintained in DRTrack for all accounts.

## Add/Edit Email Addresses

- Use the Branch drop down menu to locate the Branch to which to add/edit an email address.
- Select the box next to the name and then click the *Add/Edit Emails* button.
- Enter the information in the boxes (Acct ID, Email ID {email address}, first, last name), then select the type of events from the drop down menus to indicate when to send the recipient an email.
- Use the Add or Modify button to complete the action

> *Note: The list can be sorted by Branch, Account ID, Name, City, State, or Zip Code.*



*Figure 84 — Add/Edit Email Address*



*Figure 85 — Add/Edit Email Address*

## Delete or Clear Email

To delete one or more email addresses from one account,

- Use the Branch drop down menu to locate the Branch to which to add/edit an email address.
- Select the box next to the individual email account then click the *Delete* button.

To delete and clear all email addresses and events in the system,

- Use the *\*Clear All Email* button.
- Confirm by selecting the OK button in the info box.



*Figure 86 — Clear All Emails and Events*
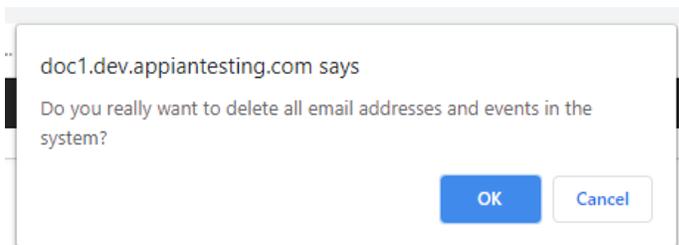


*Figure 87 — Confirm Clear Email Action*

Provision Map Manager

# Audit

*Audit* allows the user to see recent activities that have occurred within *Accounts, Appointments, Orders, Routes, or Tasks.* The types of audits that can be performed include:

- *Account Audit* - See activity associated with *Accounts* assigned under a specific *Branch*. Use the search function to select the *Branch*, and the calendar tools to select a date range
- *Appointment Audit* - See all appointment activity that has occurred within a specific date range (30 day window); the search results from this audit can also be exported to an excel spreadsheet
- *Order Audit* - See all activity associated with a specific *Order*. Search criteria by *Branch* and/or *Order ID*
- *Route Audit* - See all activity associated with a specific route. Search can be filtered by *Branch*, *Planned Start Date*, or *Dispatch ID*
- *Task Audit* - See all activity associated with a date. When *Task Audit* is selected, the *Task Log* for the current date will open; to view another date, use the search/calendar tools to select the date, branch, and task module

To perform an audit, select Admin > Audit and then either Accounts, Appoints, Orders, Routes, or Tasks.
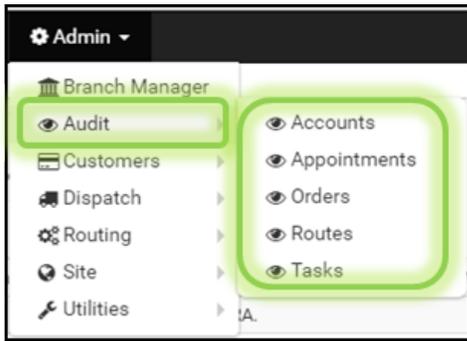
Figure 88 — Audit Activity

Note: Account Audit can also be conducted while viewing the Customer Account record, Admin > Customers > Accounts.



Figure 88 — Account Audit



Figure 90 — Appointment Audit

Note: Order Audit can also be conducted while viewing Order Details, Customer Service > Order Management > Order Details.



Figure 91 — Order Audit

*Figure 92 — Route Audit*



*Figure 93 — Task Audit*

# Customers

*Customers* provide access to key customer data fields for editing. This includes:

- **_Accounts_**
- **_Emails & Notifications_**
- **_POI_**
- **_Ship To (Ship To Manager)_**

## Accounts (Account Management)

Each customer record contains key fields unique to the customer, including name, account number, address, delivery/service requirements (*Time Windows),* special equipment requirements*,* Unload Rates and any other important info to help ensure successful dispatch and deliveries.

To view *Account Details* for any customer, select *Admin > Customers > Accounts*.

1. Search for any account by using the *branch drop down menu*, *AccountID*, or *Name*
2. When the desired account appears on the screen, select the *Account ID* to view the record
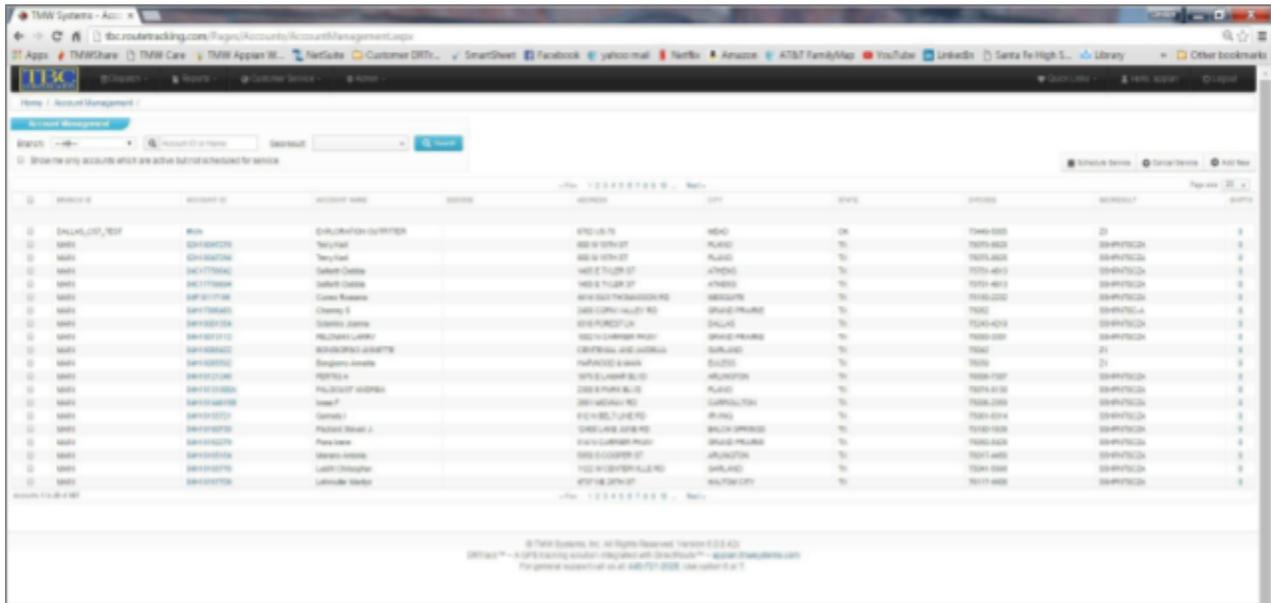
*Figure 94 — Account Management*

## Add/Terminate Account

It might be necessary from time to time to add a new account to the Account Master, or to terminate service for an account.

To add a new account, select *Admin/Account Master* from the menu.

1. *LEFT CLICK* on the *Add New* button

2. Edit to add all the new account information

3. Update *Activation Date* to enable routing

4. Ensure *Termination Date* is set to future date

5. Edit order *Frequency* and *Service/Day* (Day code)

6. *LEFT CLICK* on *Save* when complete

## Create, Edit, Make Inactive

Customer records can be edited once the record has been located and opened, using the steps listed above. After editing, be sure to select the *Save* button to commit all changes to the record.

To add a new account, select the *Add New* button from the *Account Management* page.

1. Input all pertinent account information (ex. Delivery Time Windows, Time Window Adjustments, Quantity Fields, User Fields, etc.)

2. Select Geocode (top of the screen) to locate the Lat/Long matching the customer address

3. Select the *Save* button when after all info has been entered to commit the new record to file

To make a record inactive, open the record from the Account Management page and find the *Status* box. Use the drop down menu to select Inactive, then select the *Save* button to commit the changes to file.
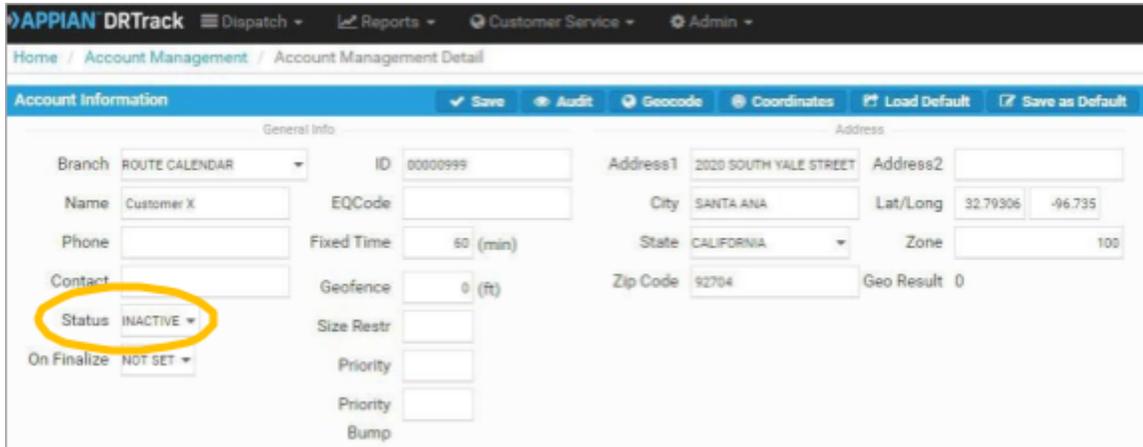


*Figure 95 — Account Status*

Additional actions available on the account page include:

1. Manually enter Lat/Long coordinates; use the mouse to move the green circle to adjust location on the map then *Update Location* or *Cancel* when done

2. Update *Load Default* to the customer account

3. *Save as Default* to save 'default' info (see *Load Default*)

4. View recent account activity by selecting the *Audit* button

To access the *Account Management* screen, navigate to *Admin > Customers > Accounts*.

1. Search for records using the *Branch* and/or the *AccountID/Name* drop down menus

2. To view and edit account details for any account, click on the *AccountID* in the list of accounts.
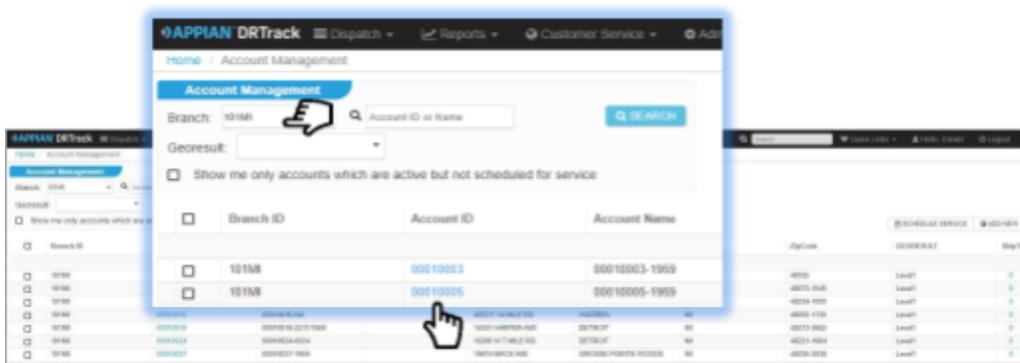


*Figure 96 — Account Management*

*Figure 97 — Account Details*

## Download Account Master (DirectRoute)

To download a current *Account Master* from DirectRoute, navigate to the main DirectRoute menu and select *DRTrack > Download Account Master*.
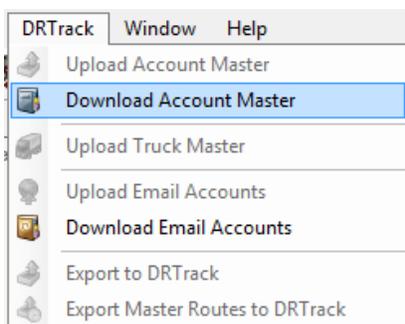


*Figure 98 — Download Account Master*

## Update Account Master (DirectRoute)

To update the *Account Master* records from DirectRoute:

1.  Open DirectRoute; from the main menu, select *File → Open*

2.  Select file type *Stop Files* and then select the desired *Account Master.xls* file

3.  To ensure records are replaced by the records in the upload file, select *Overwrite Account Master*

4.  Select *Upload Account Master*

## Emails & Notifications (Email Manager)

*Email Manager* is used to set up event-generated email notifications to selected individuals. Add or edit existing email addresses, and select which specific event-type email notifications to be sent. The types of events for which emails can be automatically generated include delivery notification, delivery scheduled, delayed deliveries, reservations created or cancelled, etc.

To add/edit an email recipient:

1.  From the DRTrack Menu, select *Admin > Customers > Email & Notifications*

2.  To add or edit email addresses and event notifications, use the drop-down menu to select the branch, or use the search function to locate the *Account ID* or *email address*

    a.  Use the left mouse key to place a check mark in the box and select the desired record

    b.  In the top left corner of the screen, select *Add/Edit Emails*
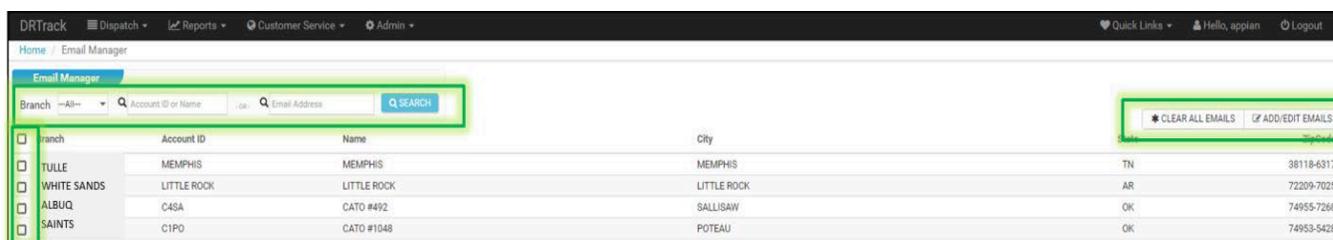


*Figure 99 — Add/Edit Emails*

**Warning:** *Selecting* **Clear All Emails** *will clear all email addresses from* <u>all accounts</u> *in the system. As a precaution, a warning notice will be received and confirmation of intent to delete will be required.*
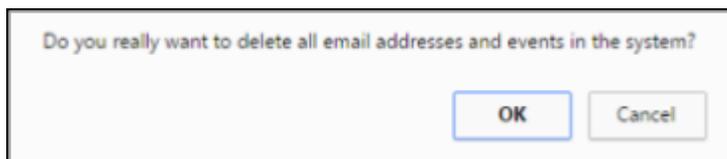


*Figure 100 — Clear All Emails*

a.  Select the appropriate *AccountID* (some have more than one) and *Email Format* type from the drop-down menu

b.  Enter the email address in the *EmailID* column

c.  Edit the *First* and *Last Name* of the email recipient

**d.** In the *Event 1* column, use the drop-down menu to select the type of event for which to send an automatic email notification

**e.** Use the additional event columns (*2 thru 5)* to select additional notifications, if needed

**f.** After all editing is completed, select *Add (Modify, Delete)* from the top right corner of the screen
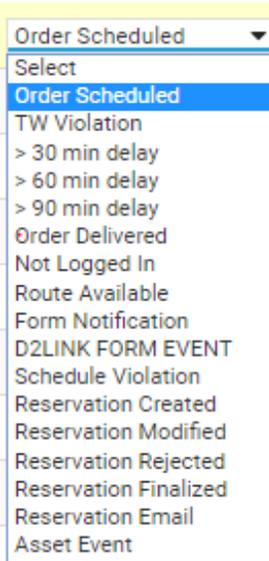


Figure 101 — Email Event Notification
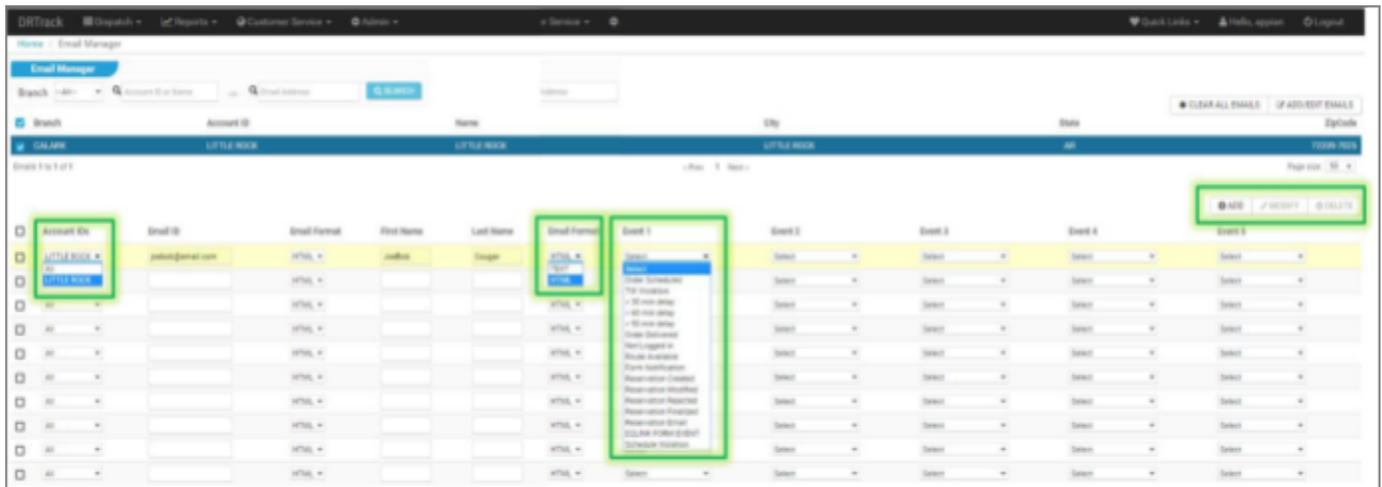


Figure 102 — Edit Email Recipient

The table below lists and describes the types of email events available for which to send notifications.

## Email Event Types Table

| Event Type | Description | Options |
|---|---|---|
| Order Scheduled | An email is sent out when an order is scheduled to be delivered on a route. This generally occurs at a scheduled interval and is sent out only once per account per order. | |
| Time Window Violation | Emails based upon an order being delayed outside of its available time windows. | |
| Delay | Emails based on an order being flagged as potentially delayed based upon incoming arrival/departure information. Multiple delay notifications can be set up for worsening status updates. | 30, 60, 90 |
| Order Delivered | This email is sent out based upon an order getting delivered (arrival / departure information populated). | |
| Not Logged In | This email is typically sent out when a route pre-assignment is not logged in for a particular duration of time after the route is scheduled to go out. | Delay Time |
| Route Available | This email is sent out to all pre-assigned and assigned drivers to let them know that their routes are available for log in. This email is generally sent out manually once dispatch knows the route building process is complete. | (Manual) |
| Form Notification | This email can go out triggered off of submission of particular forms. It will typically get sent out to dispatchers or sales team representatives, depending on the form itself. | |
| D2LINK Form Event | This email goes out when drivers text message dispatch submission of an event based form (delivery, damages, etc.) | |
| Schedule Violation | This email goes out when a driver or asset is double booked. This is for resource planning customers only. | |
| Reservation Emails | This email goes out based upon reservation events: (Created, Modified, Rejected, Finalized). These are for resource planning customers only. | |

## Point of Interest (POI) Manager

The POI feature enables users to identify and save geolocations on the map in a library that can be used in the same manner as a legitimate address when assigning and routing orders in DRTrack.

The POI feature can be useful for deliveries to locations where addresses may not yet be available (i.e. new construction) , deliveries to rural or unincorporated areas, or when addresses are not updated and/or correct, but physical location is known. Customers that spend a lot of time manually geocoding many orders will find the POI feature a great time-saver.

Capabilities include:

● Drag and drop a pin on the map and save location as a new POI
● Use Long/Lat to drop a pin on the map and save location as a new POI
● Assign POIs to unloaded orders from the Route Calendar/Route Board
● Each POI is assigned a unique name, saved in a library for reuse with any unloaded order, any customer
● The POI library can be searched and sorted, and any POI can be viewed and/or edited

The POI feature can be accessed from various locations within DRTrack for ease of use:

- *Admin→Customer→POI Manager*: Create and maintain a library of saved POIs
- *Route Board*: Assign POIs to unloaded orders with the *Assign POI* button
- *Route Calendar*: Assign POIs to unloaded orders with the *Assign POI* button
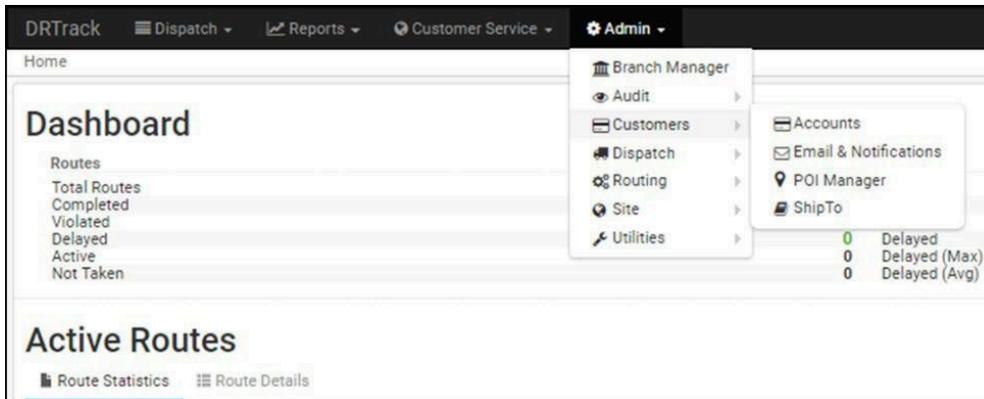


*Figure 103 — POI Manager*

## Assign POI from Route Calendar or Route Board

- Saved POIs can be assigned to unloaded orders from either the Route Board or the Route Calendar, and/or a new POI can be created and assigned, if one does not already exist
- Whether you start from the Route Board or the Route Calendar, the procedures are the same
- Once you've located an unloaded order, choose the *Assign POI* button and the application will take you to the POI Manager page to complete the necessary actions
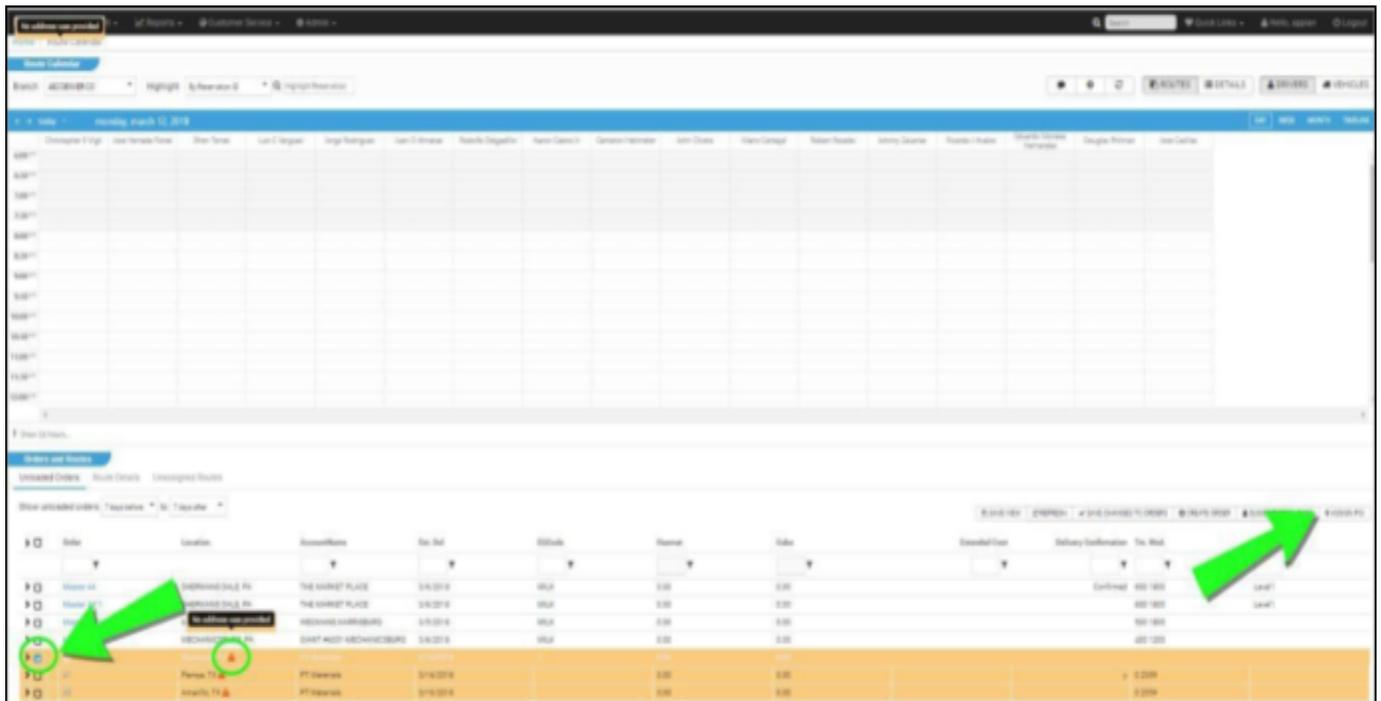


*Figure 104 — Assign POI from Route Calendar*

*Figure 105 — Assign POI from Route Board*

1. Use the drop-down menu to select the desired branch, then days, in the unloaded orders section

2. Left click on the box to the left of an order # to select that unloaded order

3. Left click on *Assign POI* box (top right corner) of the unloaded orders list to open the POI Manager page

4. To assign the unloaded order to one of the listed POIs, ensure the order is still selected (check mark in the box) then Left click on the applicable POI card in the column list ( ✔ *Assign*)

5. Selecting the unloaded order card (check box) below the map will return a list of applicable POIs to the column on the right (deselecting the unloaded order will remove POIs from the list)

> Note: Orders with no address will display a red hazard icon in the location block; hover over the icon and an info box will display/read "No address was provided".
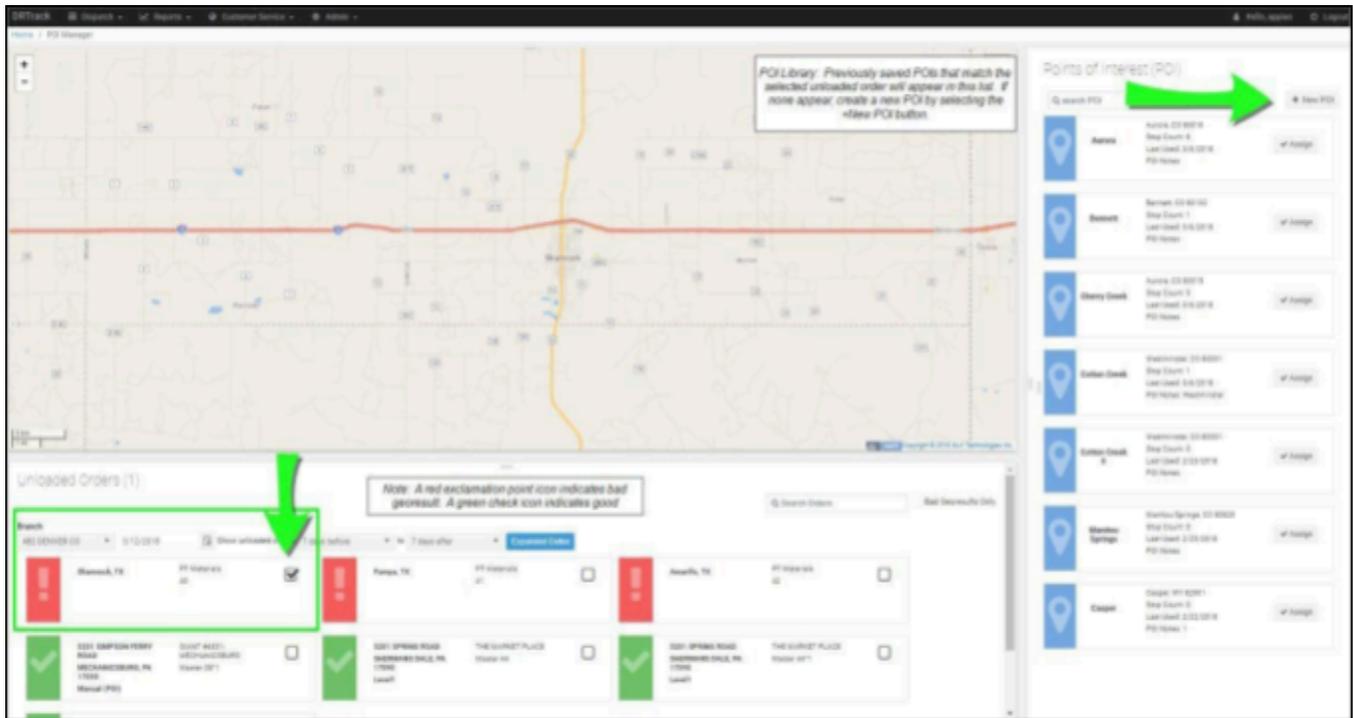
*Figure 106 — Saved POI Library List*

### Add a New POI

If no applicable POIs are listed/saved in the library, a new one can be created by selecting the **+New POI** button in the upper right corner.

1.  Use the mouse and Left click on the location on the map to mark the spot where the POI should be located

2.  Enter the new unique POI name, and City/State/Zip in the New POI Details box

3.  Left click the *Save New POI* button when done; the newly added POI will appear in the column to the right of the map, and the location will be marked by a gray pin on the map.

4.  Left click on the POI card in the column listing.

    a.  The pin color on the map will change to blue, indicating the POI was selected

    b.  A detailed address/location info box will appear on the map above the POI pin

5.  To assign an unloaded order to a newly created POI, ensure the order is still selected (check mark in the box) then Left click on the POI card in the column list ( ✔ *Assign*)



*Figure 107 — New POI Details*

> *Note: While an order address may be sparse or incomplete, at a minimum, the Zip Code must match that of the POI before the POI can be assigned to the order.*

### View or Edit an Existing POI

Details of each POI can be viewed from the column listing to the right of the map, or by selecting the POI pin on the map.

1.  When the POI pin is selected on the map, the *Edit POI Details* info box displays the address, date the POI was last used, and the date the POI was created

    a.  To edit any of the POI details, left click on *Edit* and type any necessary changes, then save the changes when complete

2.  When the POI is listed in the column list to the right of the map, the POI details only list the City, State, Zip, date the POI was last used, and any POI notes that have been added

3.  To edit any POI listed in the column list, locate the matching POI pin on the map (blue), and edit the POI as described in 1a above
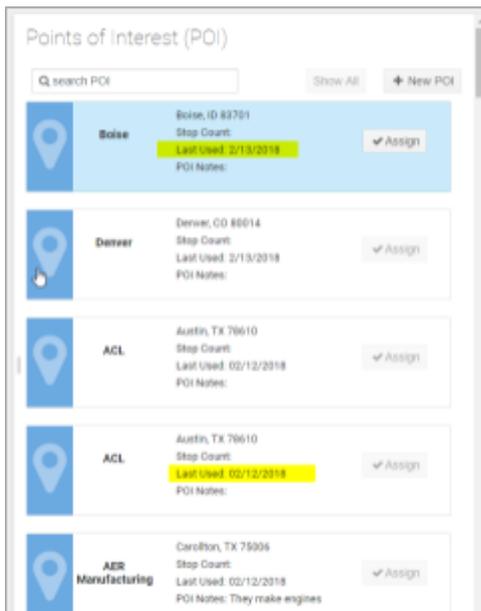


*Figure 108 — POI Listed in Column*
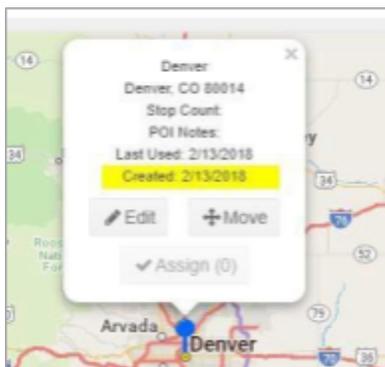


*Figure 109 — Edit a POI*

## Ship To (ShipTo Manager)

The *ShipTo Manager* is used to manage those accounts that you ship to regularly. Customer address and *Lat/ Long* can be edited from this module, and/or the account can be geocoded.

### ADD OR EDIT A CUSTOMER SHIPTO ADDRESS (LAT/LONG) OR GEOCODE A RECORD

1. From the DRTrack Menu, select *Admin > Customers > ShipTo*

2. Scroll through the list of accounts shown, or use the search function to locate a specific account

3. Selecting *Branches All* and *Show Accounts* or *Show ShipTo* will return a list of all customers

4. Show All option will return the customer Account Name, Address, City/State/Zip, Lat/Long and No. ShipTo (data index number)

5. *Show Ungeocoded Only* will return a list of those that have not been properly geocoded (missing *Lat/Long*)

    a. Use the left mouse key to place a check mark in the box adjacent to the affected account

    b. To edit customer ship address info, select the *Account Name* and edit the necessary fields then select *Save As*

    c. To geocode ship address, select the customer by placing a check mark in the box adjacent to the *Account Name*, then select *Geocode* from the top left of the screen

    d. Select *Save* to accept the changes and update the record



*Figure 110 — Show Accounts/ShipTo*
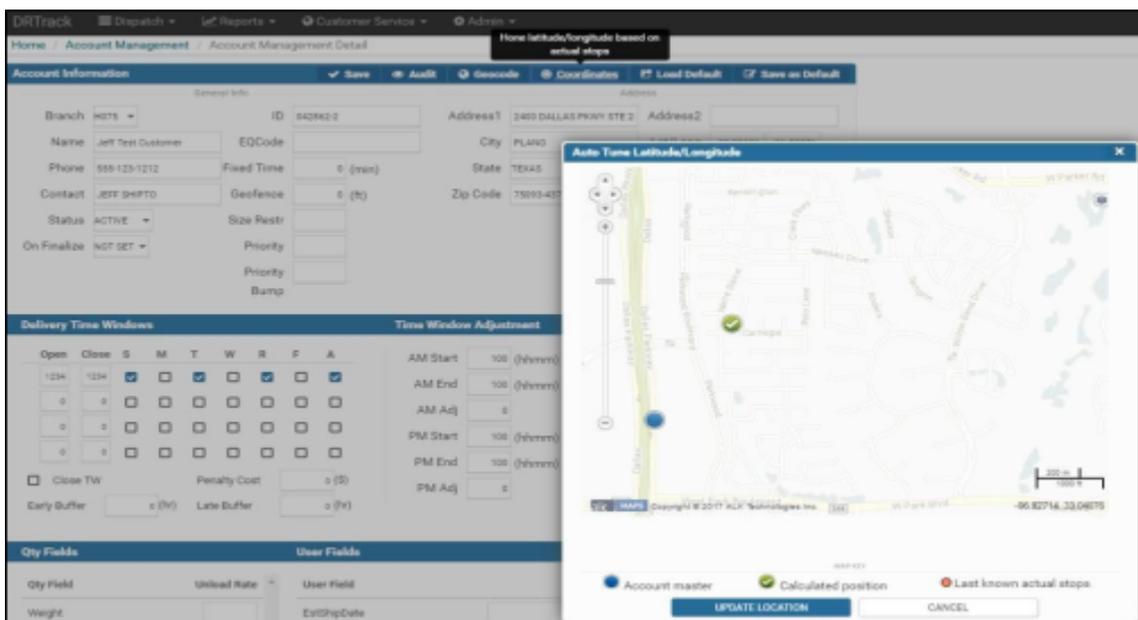


*Figure 111 — Account Coordinates*

# Schedule Master Routes(Fixed Routes)

*Master Routes* can be scheduled to automatically dispatch on a set, repetitive schedule (cycle), selecting a weekly cycle or up to a four week cycle.

Go to *Admin > Master Routes*

1.  Select the appropriate Branch from the drop down menu

2.  Click on *Add New Task*, then select *Fixed Routes*



*Figure 112 — Add Fixed Routes*

3.  Set frequency to *Daily* and edit *Time* (Time Zone) to select how often the *Fixed Routes* function should run
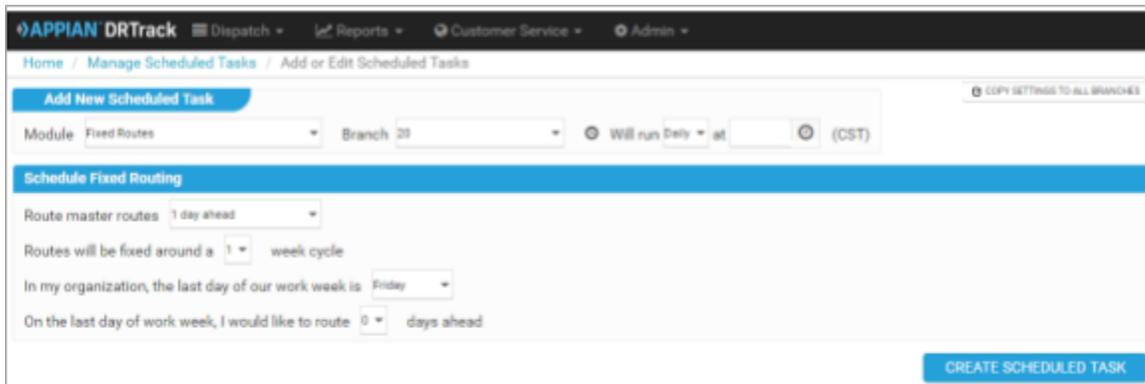


*Figure 113 — Create Scheduled Task*

Select the appropriate *Schedule Fixed Routing* options.

1.  *Route Master Routes*—Select how many days ahead to run (*example in 4., below*)

2.  *Fixed Routing Cycle*—Select the number of weeks in the cycle to route, 1 to 4 weeks

3.  *Last day of work week*—Select the day of the week that represents the last work day in your organization

4.  *Route ahead at end of the week*—Select how many days ahead to run the solution, if ran on the last day of the week

*Example:* If the last work day of the week is Friday, and you want to route ahead for Monday, then you would want to route ahead *3* days

5.  To copy these settings to *ALL* branches, select the *Copy settings to all branches* button

6.  Select the *Create Scheduled Task* button

When completed, the screen will return to the *Manage Scheduled Task* page, with the new task listed in the summary.

# Schedule Enhanced Fixed Routes

The enhanced Fixed Route is a Branch Task specifically for Fixed Route customers who use Master Routes.

- It allows users to control cloning by each daycode.
- The original Fixed Route task and Enhanced Fixed Route tasks cannot be configured to run simultaneously. Users must decide which task should be configured per branch.
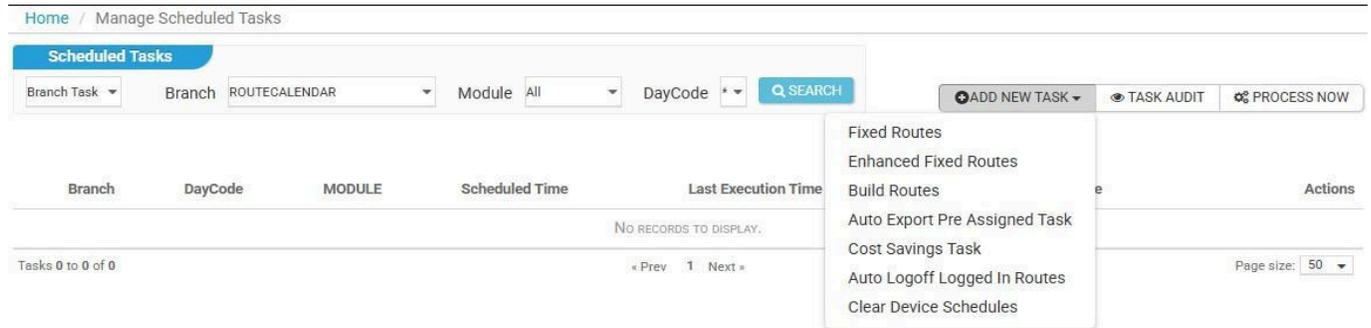


*Figure – 114 Enhanced Fixed Routes Task*
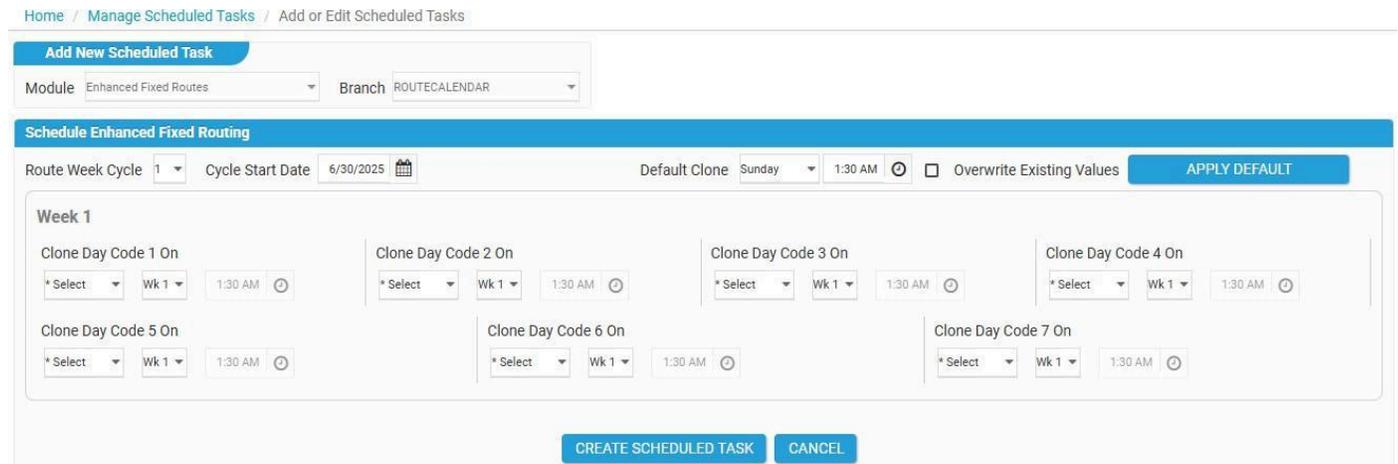


*Figure – 115 Schedule Enhanced Fixed Routing screen*

# Edit Scheduled Tasks

To edit a scheduled task for a one-time change (ex: pull an order from tomorrow's schedule, only), make the changes from the route page for that day/route.

From the menu, select *Dispatch > Routes*

1. Select the Branch, and date window to view routes
2. Select the route and order to edit

To edit a scheduled task to make a permanent change (ex: pull an order from rotation permanently), or to pause a task, go to *Admin > Master Routes.*

1. Use the *Branch, Profile,* and/or *Day Code* drop down menus to locate the route
2. Click on the box to the left of the Route # column to select the route, then select the appropriate edit button from the available buttons in the upper right cornerSelect the route and order, and edit as necessary.

## Schedule Service (New Account)

When a new account has been added, it may need to be scheduled for service. To schedule a new account for service, locate and select the account in the *Account Management* module (*Admin > Account Management*)

1. Select the record by placing a check mark in the box to the left of the *AccountID/Name*
2. Select the *Schedule Service* button
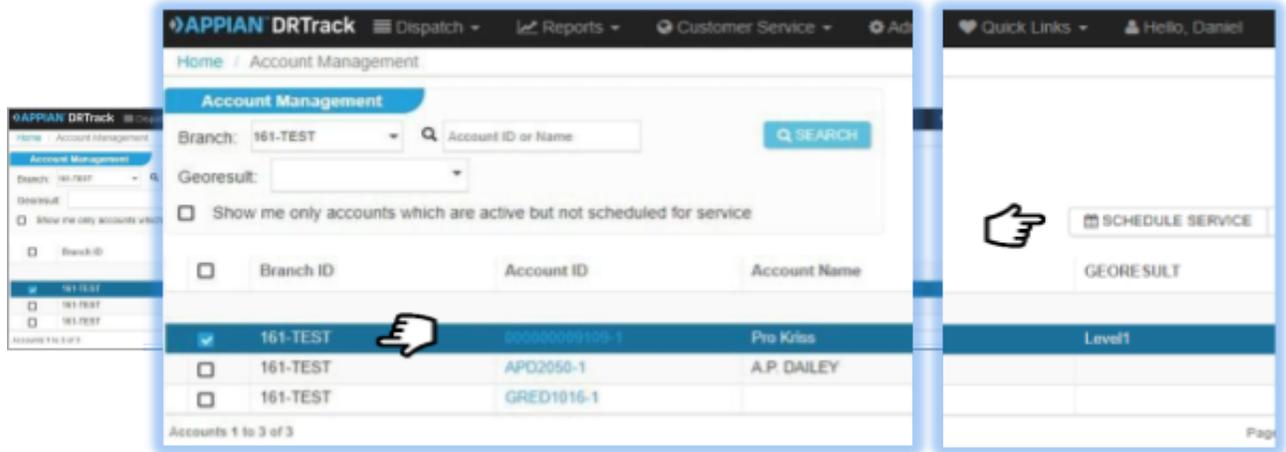


*Figure 116 — Account Management/Schedule Service*

3. Click on the *Go to Suggested Days* button
4. Select the number of days based on frequency
5. Click on the *Go to Create Orders* button to create the order
6. Verify the *OrderID* and *Pattern*, then click on *Go to Suggested Routes*

DRTrack will search list suggested routes with estimated costs for each.

7. Click on the *Load* button to select a route to load the order



*Figure 117 — Load Order on Route*

An info box will return and advise if the unloaded stop was loaded successfully.

## Terminate Service

To remove an order or account from service, locate the account by selecting *Admin/Account Management* from the menu.

1.  Type the account name in the search box, or scroll through the listed accounts to locate

2.  *LEFT CLICK* on the box to the left of the account ID/Name to select it

3.  *LEFT CLICK* on the *Cancel Service* button, or

4.  *LEFT CLICK* on the *Account ID* to open

5.  Edit the *Termination* box to update the effective date of termination

# Dispatch

Manage devices, drivers and forms from the Dispatch tab.
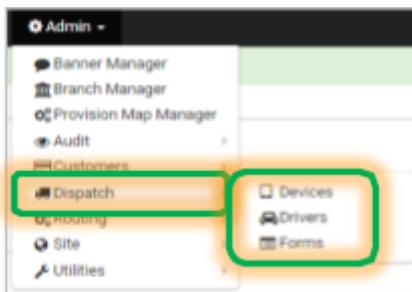


*Figure 118 — Dispatch Tab*

### Device Management (Add, Edit or Delete)

All devices, when added, will be assigned by default to the branch *MAIN*. Each device must then be reassigned (reconfigured) from the *MAIN* branch to the appropriate branch, if/when necessary.

> *Note: PeopleNet devices do not need to be added; these will automatically update the DRTrack website when device activity occurs within PeopleNet.*

To edit a device, select **Admin > Dispatch > Devices**

1.  Select the MAIN branch and find the appropriate *AssetID (Device)* that needs to be reassigned

    a.  Click on the device to open

    b.  Edit the branch assignment and any other data as needed

    c.  Ensure you check the box *Show on the Calendar*, if the Route Calendar is used for planning

2.  To add a new device, select *Add New* and add all necessary data

3.  Select *Save* when all edits are complete

    a.  Select *Save as Default* to save the record as the default template for new assets

4.  To delete a device, click on the DeviceID to open then click *Delete Device.*

Figure 119 — Device Management

## Driver Management (Add or Edit Drivers)

*Driver Management* allows users to configure the default or standard device information assigned to each driver. This allows users to preassign or manually login drivers to routes.

To manage drivers, navigate to *Admin > Dispatch > Drivers.*



Figure 120 — Driver Management

To add new drivers, select the *Add New* button. Fill in as much information as possible for each driver, then select the *Save* button when done.

1.  Select any *DriverID* to edit existing drivers; select *Save* when all editing is completed

2.  Select *Add* to add a new driver; select *Save* when all editing is completed

3.  Select *Delete* to delete an existing driver

Be sure to fill in as much info as possible for each driver, and check the *Show on Calendar* box if the Route Calendar is used for planning.



*Figure 121 — Add New Driver*

## Upload Drivers

If you have multiple Drivers to update, the information can be uploaded using the *Upload Drivers* button. Click *Choose File* to select a saved file to upload, or download a copy of the XML template and build a new record to use/upload.



*Figure 122 — Upload Drivers*

An XML template is also provided to make speedy import of applicable records.



*Figure 123 — Upload XML Template*

## Driver/Device Pre-Assignment

Whenever possible, routes should be pre-assigned to a driver before they are dispatched (depart). When the pre-assigned driver logs into the route, the system will correlate the *Driver, TruckID*, and *DeviceID* and display the appropriate GPS data. Values listed in the *DeviceID, Driver*, and *Name* columns will indicate if a driver has been pre-assigned to a route.



*Figure 124 — Driver/Device Assignment*

- An *N/A* in the *Driver* column indicates the route has not been assigned to a driver
- Values listed in the *DeviceID* column indicate association with an assigned driver or route
- The colored circles listed in the *Login* column indicate:
  - Yellow indicates the route has been Pre-Assigned to a driver
  - Green indicates the route is currently logged into GPS tracking
  - Red indicates the route is logged out of GPS tracking and the GPS device can be assigned to another route

To assign a driver to a route, select *Dispatch > Driver Login* from the main menu.
   1. Locate and select the desired route using the Branch, Date and Route Number search boxes

2. Use the *DriverID* drop down menu list to select a driver
3. Use the *DeviceID* drop down menu list to select an associated device
4. Edit the date and time under the *Login Time* column
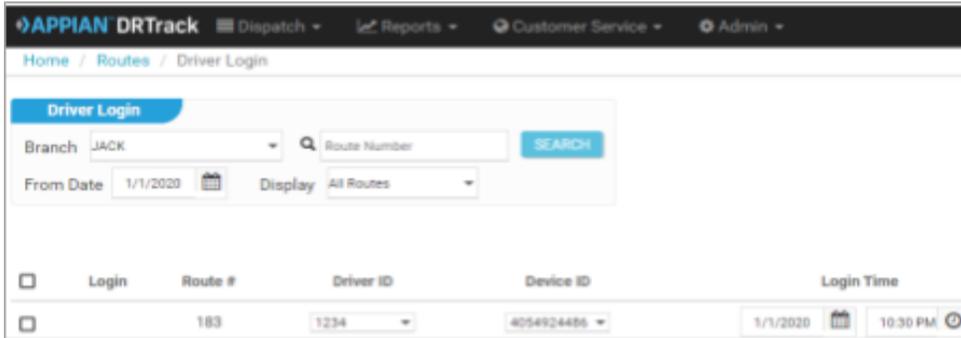


*Figure 125 — Pre-Assign Driver to Route*

Update *VehicleID, Odometer Start*, and *Trailer* fields, if applicable Select the PreAssign button



*Figure 126 — Pre-Assign Driver*

A green message will appear at the top of the screen to let you know that the driver was successfully preassigned to the route.



*Figure 127 — Driver Pre-Assigned to Route*

## Manual Driver Login

From the main menu, select *Dispatch > Routes*.
Locate the route and click on the NA for that route listed under the Driver column.

*Figure 128 — Manual Driver Login*

## Scheduling Driver Breaks

To add a driver break to a route, breaks must first be added to the truck profile assigned to the route. If the break start times and break duration times will always be the same for any given truck, regardless of route, they can be added to the *Master Truck File* (refer to **Truck Management**).

When break times and/or durations vary and/or need to be added to just one route, then add them to the specific truck profile assigned to the route.

1. Click on the route to select it, then right click and select *Stop Summary*

2. Select *Route Info,* then *Truck Info* to open the truck profile

3. Scroll to *BreakDuration1* and add the time duration in Hours (30 minute = .5)

4. Scroll to *BreakStart1* and add the time in which the break should start (ex. if break should start at 4 hours into the route, enter 4)

5. Click *Save and Reschedule* at the top right of the page when done

6. Return to the *Route Calendar* and the break should appear at the scheduled time during the route
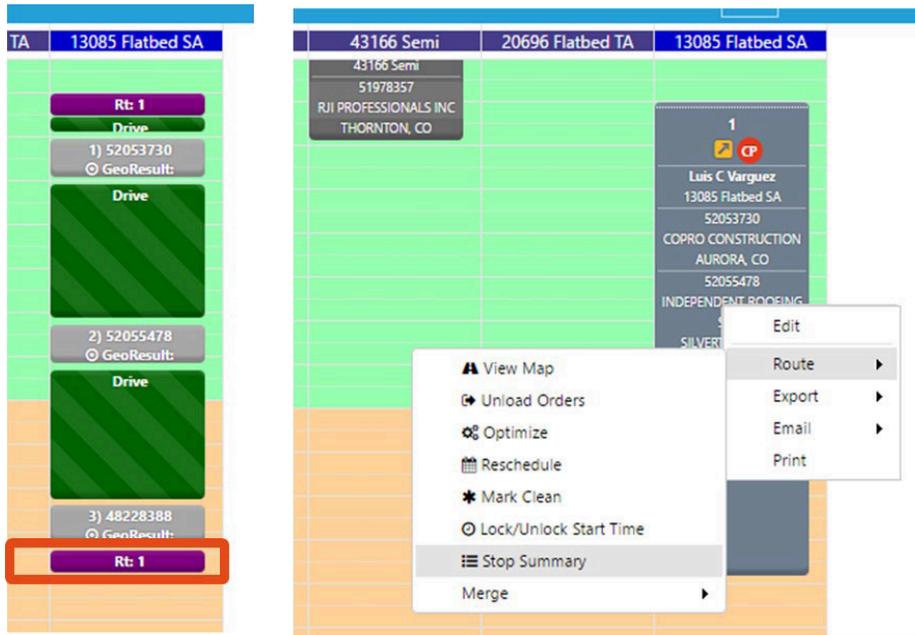
*Figure 129 — Add Driver Break to Truck Profile*
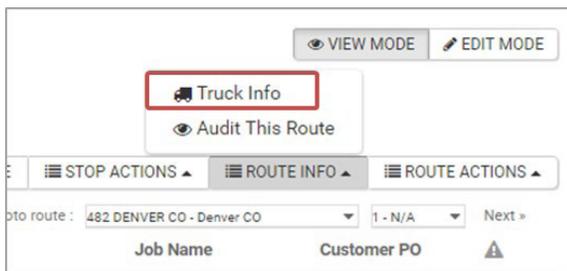


*Figure 130 — Truck Info*
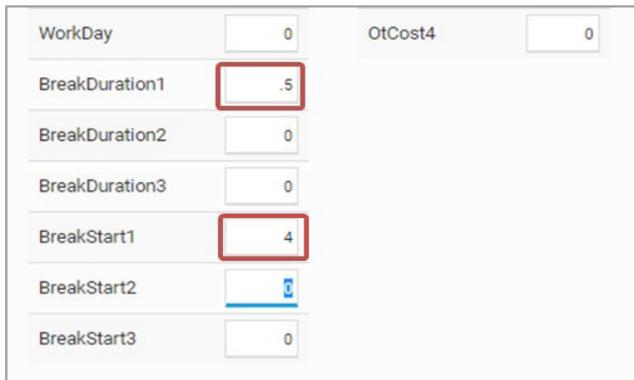


*Figure 131 — Break Duration, Break Start*

*Figure 132 — Route with Break Scheduled*

## Add/Insert Driver Breaks on the Calendar

Pick any stop location within a route to insert a break before or after the stop, or at a specific time.

1.  Click on the stop to open the info box, then select *Before, At*, or *After*

    a.  *Before*—Will insert the break before the selected stop

    b.  *After*—Will insert the break after the selected stop

    c.  *At*—Will open another info box from which to input a specific time for the break

2.  Select *Save* when done
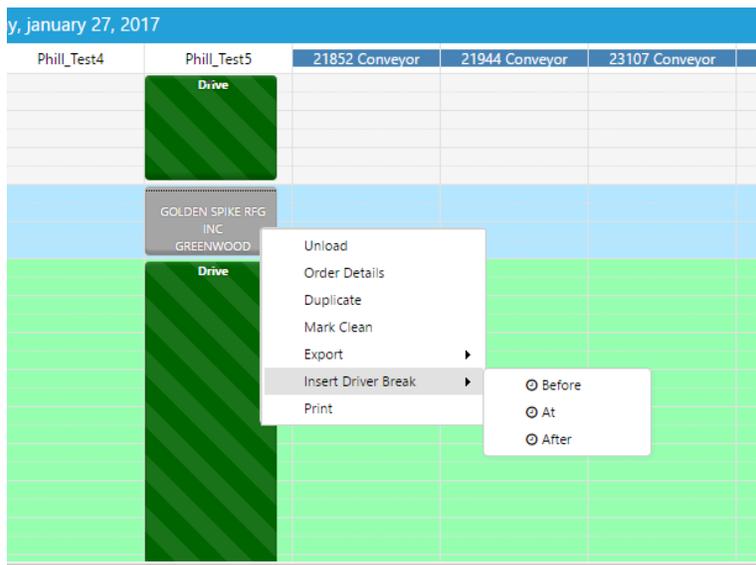


*Figure 133 — Add Driver Break on the Calendar*
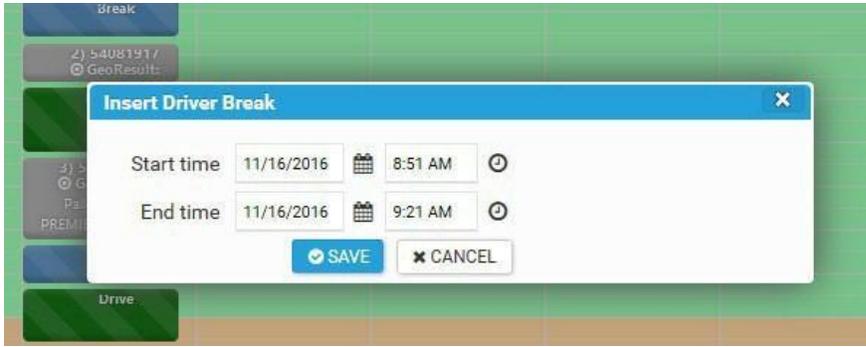
*Figure 134 — Add Driver Break at Specific Time*

**Note:** *The default break time (15 minutes = 0.25 hours) can be edited in the configuration settings. Any break entered that is less than the minimum time set, will be removed from the calendar, as will any break that is scheduled before or after the route start or end time.*

## Delete a Driver Break on the Calendar

To delete a scheduled driver break on the calendar, locate break on the schedule. Right-click on a break and select the *Delete Driver Break* info box
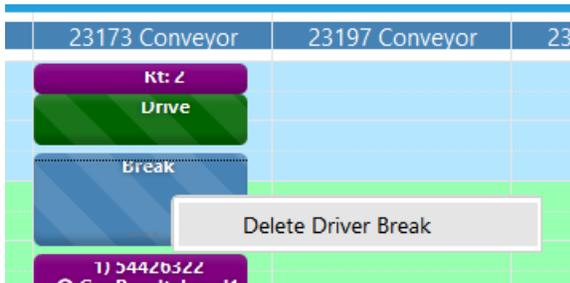


*Figure 135 — Delete Driver Break*

## Move a Driver Break on the Calendar, Merge Breaks, and Change Break Duration

Breaks on the calendar can be moved to another time during the route, or to another route, using the drag and drop method. If a break is dropped outside the route start/stop times, the break will revert to it's previous start (time).

1. To move a break, locate break on the schedule.
2. To move to a different time within the route, right-click and hold the break then drag/drop it in on the desired time (location) within the route
3. To move to a different route, right-click and hold the break then drag/drop it in on the desired time (location) on the new route
4. The *Add Break* info box will open; select *Before, After* or *At* to schedule the break when needed
5. To merge breaks, right-click on one break and drag it to overlap another
6. To change the timed duration of a break, right-click and hold the break and drag it up or down to increase or decrease the time

After each successful driver break action has been completed, a message will be displayed at the top of the page to advise of the status and/or what was changed (break time is inserted, moved, deleted, etc.).

Figure 136 — Break Status Messages



Figure 137 — Add New Account

# Routing

Manage algorithm settings, alias, assets, EqCodes, Master Routes, Trucks, delete Routes and unlock orders.

# Master Routes

## Create Master Routes (Fixed)

The *Master Routes* function allows users to create and/or upload a group of routes (from DirectRoute), to clone and schedule for recurring, automatic dispatch. When performing mostly fixed routing, this option can be a great time saver. And when necessary, *Master Routes* can be modified, added and/or deleted and exported for further analysis (Excel, DirectRoute, etc.).

## Export Master Routes from DirectRoute

1. From the DirectRoute main menu, select *DRTrack > Export Master Routes to DRTrack*
2. Select the *Branch, Profile, Start* and *End Dates*
3. Click on the *Export* button
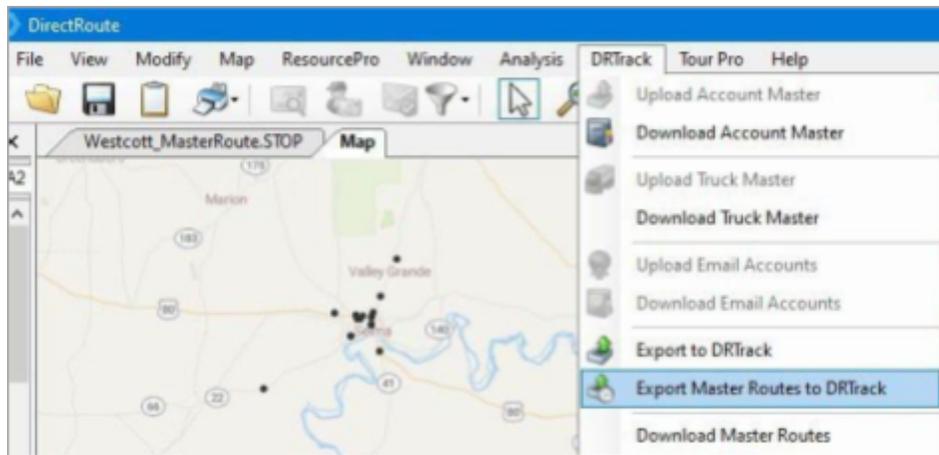


*Figure 138 — Export Master Routes from DirectRoute*
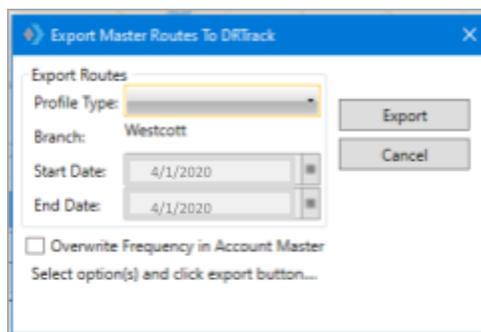


*Figure 139 — Export Master Routes to DRTrack*

> *Note: Occasionally, large Route Files may take several minutes to export. If necessary, adjust time-out settings in DRTrack and DirectRoute. Contact your System Administrator if assistance is necessary.*

After *Master Routes* have been uploaded to DRTrack, they can be modified, added or deleted, cloned and scheduled for automatic dispatch.

> *Note: When Master Routes are uploaded to DRTrack, DRTrack can auto-create Master Truck Profiles. The newly created Master Truck Profiles will bear the same name as the Master Routes Profile Name. Uncheck Ignore Empty Routes while uploading Master Routes to prompt the creation of the new Master Truck Profiles.*

## Manage Master Routes

*Master Routes* uploaded to *DRTrack* can be accessed through the *Admin > Master Routes* option in *DRTrack. Master Routes* (and Stops) can be modified, added or deleted, cloned and scheduled for automatic dispatch at specified times on a recurring basis using just DRTrack.

1. Select *Admin > Master Routes* from the DRTrack menu

2. Routes can be sorted and searched, scheduled and rescheduled from this page
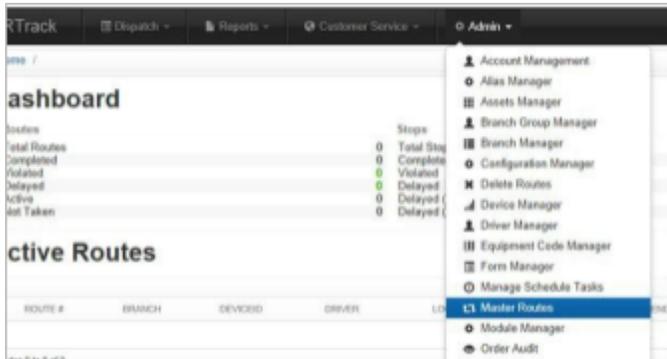


*Figure 140 — Admin/Master Routes*
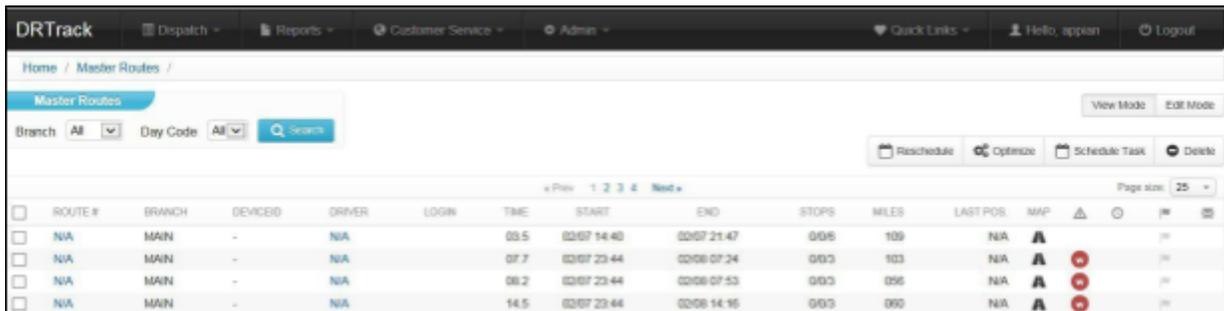


*Figure 141 — Master Routes Summary Page*

> *Note: Ensure DRTrack Admin/Configuration settings are updated to enable Fixed Routes. Select Admin/Configuration and scroll to locate EnableFixedRoutesForDSD and/or EnableFixedRoutesForService. Select the Edit button and place a check mark in the box, then select the Update button. Repeat for EnableBuildRoutes, if necessary. Upon update, it may be necessary to exit DRTrack to allow updates to process, then login to reenter. If assistance is needed, contact your DRTrack system administrator.*

# Edit Master Routes

Routes and Stops can be viewed and/or modified from various points in DRTrack. To edit routes from *Admin > Master Routes*

1. Locate the desired Route by using the Branch and Day code selection options.

2. From the list of eligible routes, select the desired route to view all stops assigned to the route.

3. Use the action buttons on the top right of the screen as needed:

   ● *View By* — Select stops to view by delivery sequence, orders to view all (consolidated) orders, or Line Items to view each item on the order

   ● *View Map* — Shows each Stop as it appears on the map

   ● *Add Stop* — Add additional Stops to the Route

   ● *Unload Stop* — Unload a Stop from the Route

   ● *Optimize* — Use this option to reposition Stops on the Route, after changes have been made to individual Stops that affect delivery dates/times

   ● *Reschedule* — Reschedule Stop delivery window times and/or date

   ● *Invert Route* — Reverses the order of delivery of the Stops, from first to last *Move Stops*—Move Stops between **Routes, from one to another** *Audit* — Provides a brief overview of events that have occurred

To edit *Arrival/Departure*

1. Click on the *Edit Mode* button provided in the top right corner of the screen

2. Insert the new date/times in the appropriate boxes;

3. To exit the edit mode and close the boxes, click on the *View Mode* button

Use view or edit orders from the *Order Management* page (*Customer Service > Order Management)*

1. Locate the stop and click on the *OrderID* to open the order summary

2. Edit the order details, save, and move to the next stop record to edit additional stops

To use the Route Board to view/edit Routes and orders, locate the route and/or stop and click on the Order ID to open the order summary

1. Edit the order details, save, and move to the next stop record to edit additional stops



*Figure 142 — Modify Stops*

# Route Violations

The following is a list of route violations that can occur on planned routes and stops.

**CP** Capacity (CP)—Truck capacity, as set in the Truck File, has been exceeded

**EQ** EQ Code (EQ)—The assigned truck and loaded stop are incompatible; a unique requirement is not being fulfilled

**W** Time Window (W)—Delivery is expected outside of the allowed times for the stop

**3** Additional Violations—A red circled number appearing next to 2 other violations indicates that 3 or more violations have been incurred; use the mouse to hover over the red circled number to view the additional violations

**DT** Drive Time (DT)—The total allowed drive time, as set in the Truck File, has been exceeded

**WK** Work Time (WK)—Work Time as set in the Truck File has been exceeded

Return Time—The terminal return time for a driver, as set in the Truck File, has been exceeded

**MD** Max Distance (MD)—The max distance for the truck, as set in the Truck File, has been exceeded

**129** Delay—The truck is delayed (the number of minutes delayed); a yellow icon indicates 60 minutes or less, and an orange icon indicates more than an hour.

Wait Time—The truck has exceeded the allotted wait time at the current stop

# Optimize Routes

Optimize routes to reduce miles, trucks and costs. This cost saving tool allows DRTrack to reorder stops on or between routes for better efficiency.



*Figure 143 — Optimize Routes*

# Truck Master Management

The *Truck Master* is a collection of vehicles assigned to each branch, that can be assigned to routes and drivers. All pertinent vehicle information is listed for each individual truck, including volume limits, cost factors, work rules, assigned branch (depot/origin location), and special equipment.

## Add or Edit Trucks

To manage the *Truck Master* and add, edit, or delete vehicles, navigate to *Admin > Routing > Trucks.*



*Figure 144 — Truck Master Management*

1. Select any *TruckID* to edit existing vehicles; select *Save* when all editing is completed

2. Select *Add* to add a new vehicle; select *Save* when all editing is completed

3. Select *Delete* to delete an existing vehicle

4. Select *Profile* to view (add or delete) existing vehicle profiles

Be sure to fill in as much info as possible for each truck, including *Work Rules, Cost Factors, Quantity Values* and *User Fields*. After adding each new vehicle and assigning the depot/origin location, select the *Geocode* button at the top right of the screen, to add the Lat/Long location of the vehicle's primary location to the record.



*Figure 145 — Truck Master Details (Page 1)*

## Site

Licensing, Modules, Settings & Configurations, Tasks, UserGroups and Permissions and Users

## Utilities

Cost Savings Statistics



*Figure 146 — Cost Savings Statistics*

## Export (Upload) Routes to ERP/WMS/OMS

Once routes have been finalized, an Upload File (UPL) can be created and exported back to an order management system, or host system, for processing. The most common way that routed orders are uploaded to a host system is by using the menu option, *File→ Upload* option in DirectRoute.

The Upload File (UPL) can be created as either a text upload file (.xml) or a fixed length field text upload file (.urp). The primary difference between the two file types is the selection of fields (data) that will be passed in the Upload File, back to the host system.

- The *.XML Upload File contains a specific set of data fields that will be included in the file
- The *.URP Upload File enables control and selection of data fields that will be included in the file

Any member of the Implementation & Training team can assist you in creating the initial formatted *Upload File*. Once the file is created, it will be written for export to the host system each time the *File→Upload* option is used in DirectRoute (refer to the *DirectRoute User Guide, 11 Creating Upload Files* for more information).



Example *.XML* Upload File

Example *.UPL* Upload File

*Figure 147 — Upload File*

## Cost Savings Scenario Tool

The Cost Savings Scenario Tool provides statistics for a given date range, and offers filtering options such as Optimized Within and Optimized Between Routes.

1. Navigate to *Admin→ Manage Scheduled Tasks*

2. Select a branch from the drop-down menu

3. Select *Add New Task→Cost Savings Task*


To populate the data, run the Cost Saving Task.
Admin→Cost Savings Statistics
1. Click on Cost Savings Statistics
2. Select branch and date range
3. Click search Admin→Cost Savings Statistics
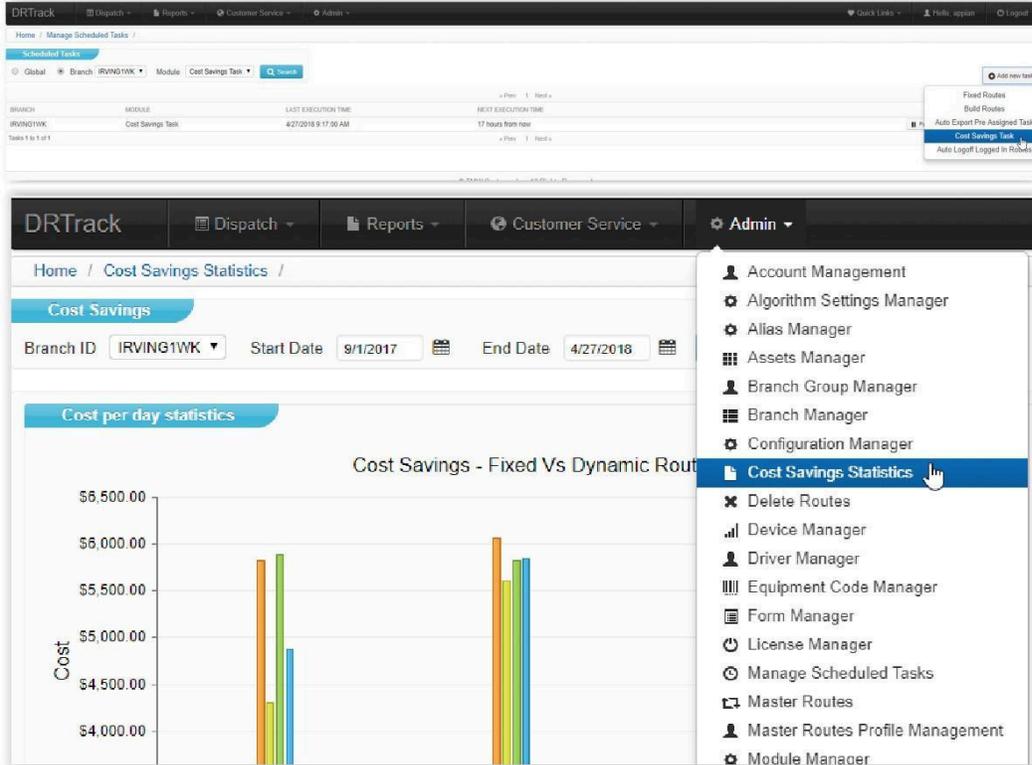


*Figure 148 — Cost Savings Statistics page*
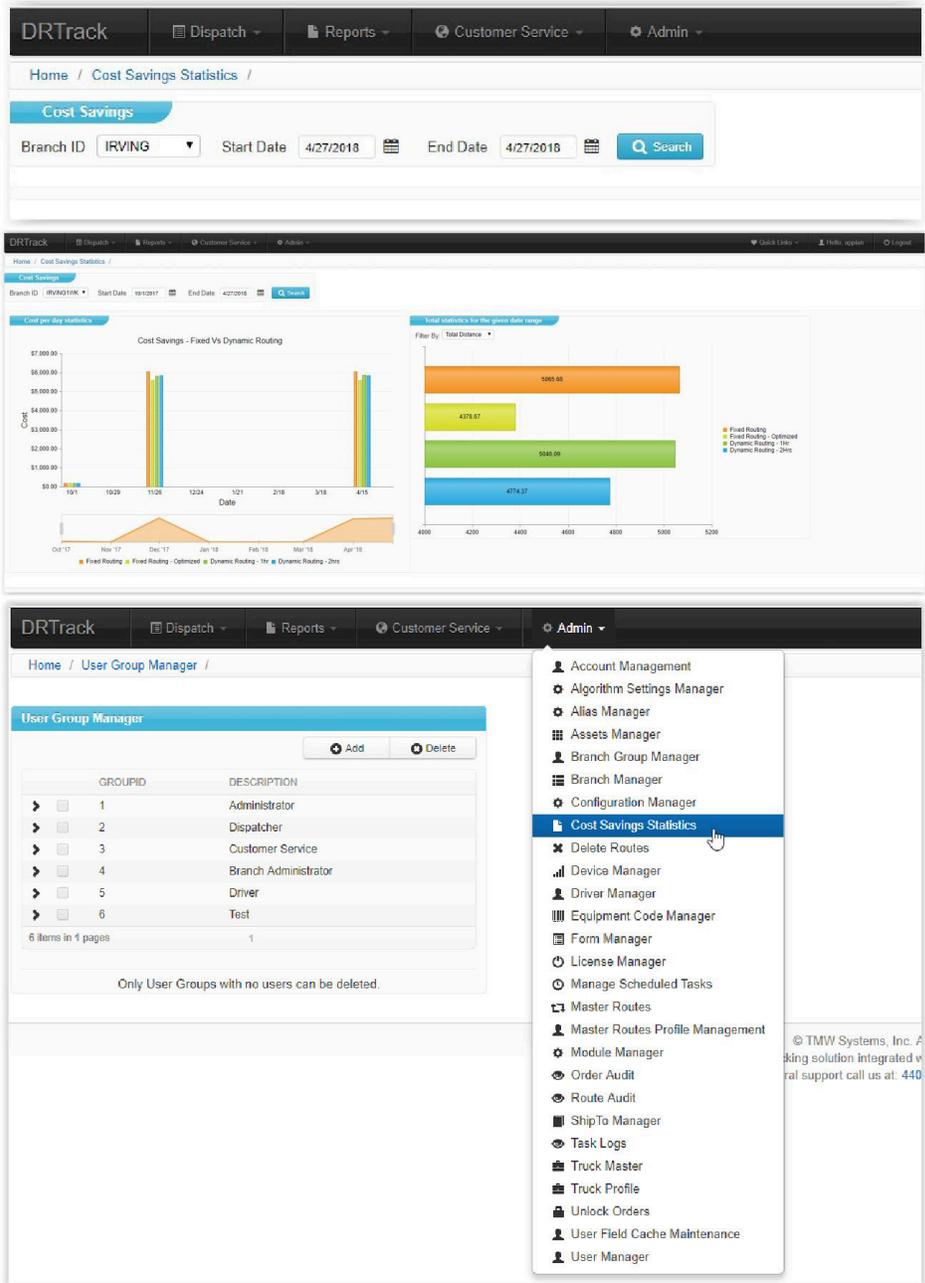
*Figure 149 — Cost Savings Statistics User Group Manager*

# DRTrack ERP Interface

An XML interface is provided to pass order information between the ERP system and DRTrack. The details and specifics of each field used in the XML schema is given below.

The *DRTrack Export Table* contains data for finalized routes that can be retrieved for use in the ERP system. The *XML Order Import Table* is laid out as follows:

- Column 1—Field Name
- Column 2—Field Type {*Enumeration (E), String (S), Numeric (N), Duration (DU), Date (D), Time (T), Boolean (B)*}
- Column 3—Width

- Column 4—Required (R), Optional (O)
- Column 5—Field Description
- Column 6—Sample Field Value

## XML Order Import Table

| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|
| Key | N | | R | An unique identifier for each DRStop element | 1 |
| Branch | S | 20 | R | The name of the branch the customer belongs | MAIN, OKC or DALLAS |
| Name | S | 50 | R | The name of the customer | Appian |
| Contact | S | 50 | O | The name of a contact at the customer site | Joe |
| Phone | S | 25 | O | Telephone number of the customer | 800-893-1250 |
| ID1 | S | 30 | R | A unique identifier for this stop. Typically, an account number | A0001 |
| ID2 | S | 25 | R | A unique secondary ID normally used for order number | O0001 |
| ID3 | S | 25 | R | Third Identifier field normally used for a line item number or SKU. Can be default value for all records | L0001 |
| Address | S | 100 | R | Street address for the customer | 10317 Greenbriar Pl |
| Address2 | S | 100 | O | Secondary address information (e.g. suite number, building, etc.) | Ste 100 |
| City | S | 35 | R | The name of the city for this customer | Oklahoma City |
| State | S | 2 | R | 2 character abbreviation for the state or province | OK |
| Zip | S | 10 | R | The zip code or postal code of the customer | 73159-1514 |
| FixedTime | DU | | R | Number of minutes at this customer. Each customer can have a different fixed time | PT0H25M |
| RouteNumber | N | | O | The route number that this stop is normally placed on | 1 |
| Leg | N | | O | The leg number that this stop is normally placed on | 1 |
| Seq | N | | O | The position of this customer within a route | 1 |
| SizeRestriction | N | | O | This field corresponds to the Capacity 1 field in the Truck file | 42000 |
| EqCode | S | 50 | O | Equipment code for assigning account to particular vehicles | @AB-BH |
| DRVolume (unlimited) | | | R | Volume to be delivered. One field for each volume used (ie. weight, cube, pallets, etc.) | See Volume Table for details |
| DRTimeWindow | | | O | Open time and close time of delivery time window and the day of delivery. | See Time Window Table for details |

| | | | | | |
|---|---|---|---|---|---|
| Zone | N | | O | Speed zones used to increase or decrease truck driving speed within a delivery area. An example would be if the customer is located within a congested downtown area. A value of 125 increases driving time by 25%. Similarly, a value of 90 decreases the driving time by 10%. | 125 |
| OrderType | E | | R | Add—New Order, Modify—Update Order, Delete—Delete Order. If Modify is set as OrderType and if that order doesn't exist in DRTrack then it will be added as a new order | |
| Longitude | N | | O | Longitude of customer (calculated by DirectRoute) | -97.5225 |
| Latitude | N | | O | Latitude of customer (calculated by DirectRoute) | 32.7545 |
| DRUserFields (Unlimited) | | | O | Optional data fields with additional information pertaining to the account. | See table 4 for details |
| Symbol | S | 10 | O | The symbol displayed on the map when orders are downloaded to DirectRoute | Diamond |
| Size | N | | O | The size of the symbol displayed on the map when orders are downloaded to DirectRoute | 16 |
| Color | S | 10 | O | The color of the symbol displayed on the map | Green |
| MaxSplits | N | 2 | O | Maximum number of times an order can be split | 0 |
| EarlyBuffer | DU | | O | The EarlyBuffer, in conjunction with the LateBuffer and PenaltyCost, is used to create Soft Time Windows. The Early Buffer applies a buffer, noted in hours, to the Time Windows. A buffer set to half-an-hour (.5) would stretch the front of the Time Windows by a half-an-hour. (I.e.: Time Windows of 07:00-11:00 would actually be computed as 06:30-11:00). When a stop uses the offered buffer, a penalty cost can be applied, as laid out in the PenaltyCost Field | PT1H25M30S |
| LateBuffer | DU | | O | The LateBuffer, in conjunction with EarlyBuffer and PenaltyCost, is used to create Soft Time Windows. Late Buffer applies a buffer, noted in house, to the Time Windows. A buffer set to half-an-hour (.5) would stretch the back of the Time Windows by 30 minutes (I.e.: Time Windows of 07:00-11:00 would actually be computed as 07:00-11:30). When a stop uses the offered buffer, a penalty cost can be applied, as laid out in the PenaltyCost Field | PT2H |
| PenaltyCost | N | | O | The PenaltyCost column, used in conjunction with EarlyBuffer and LateBuffer, is used to apply a penalty to stops that use the buffers; penalty cost, applied in Cost per Hour. Penalty Cost is used to calculate not only penalty charges for a stop using the buffer, but also during optimization. DRTrack will attempt to move a stop with a penalty cost to another route, eliminating the penalty. | 50 |

| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|
| Estimated DeliveryDate | D | | R | The Date/time the order is expected to deliver | 2010-01-10T18:05:00 |
| EarliestDate | D | | O | When a Stop must be delivered within a certain timeframe, then Earliest Date may be used to ensure that the stop is completed within the restrictive time. | 2010-01-08 |
| LatestDate | D | | O | Latest Date is used in conjunction with Earliest Date. This is the latest that a stop may be serviced. LatestDate may be the same as the Earliest Date, if there is only one day in which the stop may be serviced | 2010-01-12 |
| CloseTW | B | | O | If the customer's delivery must be completed (delivered, unloaded and out) by the late time window time, this field will be TRUE. | True or False |

## XML Order Import Volume Table

| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|
| No | N | | R | ID | Field Value |
| Name | S | 25 | R | Name of the Qty Field | Weight, Cube, Pallet |
| Volume | N | | R | Amount to be delivered to the stop | 2000 |
| UnldRate | N | | R | The amount of time it will take to unload material per hour. It will take 2 hours to deliver 2000 units at an unld rate of 1000 units/hr (Pass 0 to ignore unload rates) | 1000 |

*Note: Service Time at delivery locations are calculated based upon Fixed Time and Unload Time. Setting unload rates to 0 will make the fixed time be the total service time.*

## XML Order Import Time Window Format Table

| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|
| Open | T | | R | Open time of the delivery time window. (seconds are ignored) | 07:00:00 |
| Close | T | | R | Close time of the delivery time window. (seconds are ignored) | 13:30:00 |
| Pattern | S | 7 | R | Day of the delivery. Allowed Characters: S—Sunday M—Monday T- Tuesday W—Wednesday R- Thursday F—Friday A—Saturday | MWFA, SMF, RFA |

## XML Order Import DR User Fields Table

| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|
| No | N | | R | ID | Field Value |
| Name | S | 25 | R | Name of the UserField | SalesPerson |
| Value | S | 255 | R | Value of the UserField | Bob |

The XML schema contains optional tags for *DRTimeWindow*, *DRBreakTime*, *DROvertime*, *DRTruck*, and *DRTruck Envelope* that are used in a different interface (can be ignored).

```
<?xml version="1.0" encoding="utf-8"?>
<DRStopEnvelope
xmlns:xsd="http://www.w3.org/2001/XMLSche
ma">
 <DRStop Key="2">
  <Address>3102 AVENUE I</Address>
  <Address2 />
  <Branch>Main</Branch>
  <City>SCOTTSBLUFF</City>
  <CloseTW>false</CloseTW>|
  <Color>14</Color>
  <Contact />
  <EarliestDate>2009-01-08</EarliestDate>
  <EarlyBuffer>PT0S</EarlyBuffer>

  <EstimatedDeliveryDate>2009-01-
10</EstimatedDeliveryDate>
  <EqCode />
  <FixedTime>PT15M</FixedTime>
  <ID1>93250</ID1>
  <ID2>26522</ID2>
  <ID3>2</ID3>
  <LateBuffer>PT0S</LateBuffer>
  <LatestDate>2010-01-12</LatestDate>
  <Latitude>0</Latitude>
  <Longitude>0</Longitude>
  <MaxSplits>-1</MaxSplits>
  <Name>THE HOME DEPOT #3210</Name>
  <OrderType>Add</OrderType>
  <PenaltyCost>5</PenaltyCost>
```

*Figure 150 — XML Sample File*

# DRTrack Order Import Module

Order Import Module is a windows based service used to send customer orders to DRTrack for route tracking. The module expects specific XML formatted data and accepts CSV or tab delimited extract file from an ERP system.

The data flow process for a typical DRTrack implementation project

- *ERP System→Extract File Directory→DirectRoute→DRTrack*
- No custom code is required to integrate with DRTrack
- Debugging tool to analyze extract file
- Windows application to analyze converted data
- Can export corrected/saved file from here and will identify error fields to correct
- DRTrack will send an email notification when validation errors are detected in the extract file
- The data file can be configured using DRProject.config file in DirectRoute

Data flow process for using Order Import Module:
- *Model 1: Start→Load Extract→Validate Orders→Convert to XML→ Export to DRTrack*
  - o Process one order at a time
  - o Removes special characters (™, ©, ®, …)

- o   EQCodes should not be affected

- *Model 2: ERP→Extract File to Directory→Window Service*
    - o   The service scans for files then sends the files to DRTrack
    - o   Generates estimated ship date if not available in the extract file

- Required Columns
    - o   ID1 / ID2

- Optional Columns
    - o   Branch (if empty, defaulted from config file)
    - o   Action (possible values if empty, defaulted from config. file…add, modify, delete, delete all)
    - o   Estimated Ship Date (if empty, defaulted to current date with an option to offset days)
    - o   Quantify field, User field (need to be configured in *DRProject.config file*)
    - o   ID3 (if empty, defaulted to ID2)
    - o   Address, address 2, city, state, zip, Lat/Long
    - o   Time Window, EQCode, FixedTm, EarlyBuffer, LateBuffer, EarliestDate, LatestDate, Penalty Cost, Zone

# Okta Authentication API With SAML Single Sign-On (SSO) For DRTrack

Okta Authentication API has now been enabled to allow the DRTrack LDAP sync component to communicate directly with our customer's *LDAP Server URL* to sync authorized users into the DRTrack database. Previously, the sync service required communication directly with the server, a method that could pose a potential security risk to both our customers and the software.

Okta is a Certified OpenID Connect provider and the Okta Authentication API provides operations to authenticate users, perform multi-factor enrollment and verification, recover forgotten passwords, and unlock accounts.

Organizations only need to run the SSO-LDAP Sync Task to sync active users from DRTrack, and maintain the list by adding new users when necessary.

System Administrators: To run the SSO-LDAP Sync Task:

- Navigate to *Admin→Site→Users (User Manager)* and review the list of current DRTrack users; add/delete any new or old users (as needed) and complete any needed updates to user info (ensure each user has a current email address)
- Navigate to *Admin→Site→Tasks (Manage Scheduled Tasks)* and select *Global Tasks* from the drop down menu
- On the *LDAP Sync Task* click the *Run Now* button (if not listed, select '*Create New Task*' and add the task)
- Click the *Process Now* button on the right side of the screen, then refresh the web page
- The '*Next Execution Time*' should have reset and the '*Last Execution Time*' should display the current date/time (indicating the task was just completed)
- Login to Okta to view your organizations active (Okta User Store) and compare the list to the users listed in DRTrack* to ensure the sync task updated the necessary records
- Additional info is available at ***https://developer.okta.com/docs/api/resources/users.html#list- users***

New users with a valid email address can be assigned to the DRTrack application and added to Okta via the sync task at any time by their organization's System Administrator. When added, a new user will receive an automated email from Okta with instructions to activate their account using a link provided in the email. Only after proper activation will new users be able to use their credentials to login to the DRTrack site via SSO. Additional info on creating new users in Okta can be found at
*https://developer.okta.com/docs/api/resources/users.html#create-user*.

# DRTrack Configurations and Settings

Most users will have access to the *Settings and Configuration Table* within DRTrack thru the Admin tab (*Admin→Site→Settings & Configuration*) on the main menu. Settings and configuration inputs control the behavior of different functions, and in some cases, the appearance of different keys and buttons used through DRTrack. It's important to understand the current behavior and the expected behavior of each item before making any changes. The Settings and Configuration Table identifies and describes many of the settings and options available and can help you determine if or when you might want to change a particular setting.

Please note, this may not be a complete list and/or you may not have access to see or edit all options, based on your role assignment as determined by your Site Administrator. If you have questions about any of these functions, ask your manager or the Site Administrator for help. Additional assistance can also be provided by your assigned *Appian Project Manager* or contact Trimble MAPS Support, *support@trimblemaps.com,* Phone: (800) 663-0626, Option 6 then Option 7.

## Configuration Settings Table

| Section | Name | Value (Sample) | | Description |
|---------|------|----------------|---|-------------|
| 10-4 | 10-4 Send Position Events API URL | https://uat.10-4.com/atlas/frexapi/shipment/position | | 10-4 API URL to Send Position Events. |
| 10-4 | 10-4APIKey | 8z7nls77E1RXdT Q | | 10-4 Client API Key |
| 10-4 | 10-4APIRELATIONSHIPURL | https://uat.10-4.com//atlas/frexapi/relationship | | 10-4 Client URL for Relationship endpoint |
| 10-4 | 10-4APISHIPMENTURL | https://uat.10-4.com//atlas/frexapi/shipment | | 10-4 Client URL for Shipment endpoint |
| 10-4 | 10-4ETASourceOfTruth | True (✓) or False | | 10-4 is ETA Source of Truth |
| 10-4 | 10-4GPSSourceOFTruth | True (✓) or False | | 10-4 is GPS Source of Truth |
| 10-4 | ENABLE10-4 | True (✓) or False | | Indicates whether the 10-4 integration is enabled |
| ApptScheduler | AUTOGENORDERID | True (✓) or False | Edit | The time window used when creating an order for Appt Scheduler. |
| ApptScheduler | MANAGERAPPROVALDIFF | 100 | Edit | The amount when met or exceeded will require manager approval (0 for unlimited). |

| | | | | |
|---|---|---|---|---|
| ApptScheduler | MAXORDERSTOREMOVESEEDSTOP | 1 | Edit | The number of orders that must be added to a route before the seed stop is deleted. |
| ApptScheduler | MAXTIMEWINDOWTHREADCOUNT | 5 | Edit | The maximum number of threads to use when calling time window suggest routes. |
| ApptScheduler | ORDERTIMEWINDOW | 4 | Edit | The time window used when creating an order for Appt Scheduler. |
| ApptScheduler | SERVICERADIUS | 1000 | Edit | The route radius used when calling suggesting routes for Appt Scheduler. |
| ApptScheduler | TIMEWINDOW | 2 | Edit | The time window used when calling suggesting routes for Appt Scheduler. |
| csv | EnableExportToCSV | True (✓) or False | Edit | Determines whether or not to show the Export to CSV option. |
| csv | Notes | | Edit | Uses tokens to determine what information will be displayed in the Notes column. |
| Csv | StopDescription | | Edit | Uses tokens to determine what information will be displayed in the StopInformation column. |
| d2link | ArrivalFormIdV2 | | Edit | Default Arrival Form for D2LinkV2 |
| d2link | DetailsDisplay | | Edit | Configures the format in which stop/order details are displayed to the driver. |
| d2link | EnableArrivalForms | True (✓) or False | Edit | Enables arrival forms for d2link devices |
| d2link | ExportEndTerminals | True (✓) or False | Edit | Makes End Terminal visible on D2Link schedule. |
| d2link | OrderHeaderDisplay | {OrderID} | Edit | Configures the format in which orders are displayed to the driver on a D2Link device. |
| d2link | ReExportCompletedStops | True (✓) or False | Edit | DRTrack will export already-completed stops to D2Link when routes are re-exported. It will send those stops as Completed stops to D2Link. |
| d2link | StopHeaderDisplay | {Customer Name} | Edit | Configures the format in which stops are displayed to the driver on a D2Link device. |
| d2Link | LINEITEMDETAILDISPLAY | {LineItemID}, {user:Jobname}, {Customer} | Edit | Determines how line items are displayed in D2Link |
| D2Link | D2LinkAccounts | IntegrationDB | | D2link accounts |
| D2Link | D2LinkV2Accounts | IntegrationDB | | D2linkV2 Accounts |
| D2Link | FirebaseURL | | | D2link FirebaseURL |
| D2Link | LINEITEMHEADERDISPLAY | {LineItemID}, {user:Jobname}, {Customer} | Edit | Determines how line items are displayed in D2Link. |
| D2Link | TestD2LinkClientName | | Edit | Configure an optional test client name. Use in conjunction with TestD2LinkDevices. |

| D2Link | TestD2LinkDevices | | Edit | Comma separated list of device IDs to use with the TestD2LinkClientName. |
|---|---|---|---|---|
| dotnet | DefaultDisplayQtyAlias | Pallet Qty, Hazmat | Edit | Configuration to display up to two QtyAlias in aspx page. Please enter comma separated QtyAlias (value from TBLQTYFIELDS.QTYALIAS column).<br>Ex: Cube, Pallets |
| dotnet | DefaultDisplayQtyAlias | Pallet Qty, Hazmat | Edit | Configuration to display up to two QtyAlias in aspx page. Please enter comma separated QtyAlias (value from TBLQTYFIELDS.QTYALIAS column).<br>Ex: Cube, Pallets |
| dotnet | AlgoConsolidateFixedTimes | True (✓) or False | Edit | Consolidates fixed time if set to true |
| dotnet | AllowInsertingStopsImmediatelyAfter LastCompleted | True (✓) or False | Edit | Allow dispatchers to insert stops immediately after the last completed stop. They will be warned that this could be a bad idea. |
| dotnet | AllowModifyFinalizedOrder | True (✓) or False | Edit | Enables the ability to refinalize a modified or added order |
| dotnet | AppendCaretToDuplicatedLineItems | True (✓) or False | Edit | AppendCaretToDuplicatedLineItems |
| dotnet | ApplyTimeBoundariesOnRelated Routes | True (✓) or False | Edit | Consider resources assigned to surrounding routes to apply constraints to routing functions to prevent overlapping resource allocation. |
| dotnet | AutoCorrectLoginTime | True or False | Edit | Automatically adjusts login time based on actual performance to determine when a route was started. |
| dotnet | AUTOEXPORTROUTESMODE | None | Edit | Determines which auto export action to take when routes are added to DRTrack. Options: XRS, TomTom |
| dotnet | AutogenerateOrderIds | True (✓) or False | Edit | Determines if order ids need to be autogenerated or not |
| dotnet | AutoLoginPreassignedRoute | True (✓) or False | Edit | Checks for open route preassignments every few minutes and automatically logs in devices at the appropriate time based on the route start time. |
| dotnet | AutoLoginPreassignedRoute Buffer Time | 15 | Edit | Allows for an early login time when automatically logging in preassigned routes near the route start time. Provide a value in Minutes. |
| dotnet | BranchDropDownDisplay | BranchID | Edit | Determine how the branch drop down should look. |
| dotnet | ColorRouteRowsWithDelay | True (✓) or False | Edit | Determines whether or not to color the entire row of routes which exhibit a delay. |
| dotnet | ColorStopsWithDisplayColor | True (✓) or False | Edit | Determines whether or not to use the DISPLAYCOLOR field to color stops on the EditRoutes page. |

| dotnet | CompactStopSummaryMenu | True (✓) or False | Edit | Enables compacting stops summary page button menu to the pre-7x layout |
|---|---|---|---|---|
| dotnet | CONDITIONALLYUPDATEACCOUNT | True (✓) or False | Edit | Enables conditional updating for account fields when updating from the web service. |
| dotnet | ConsolidateByAddress | True (✓) or False | Edit | Consolidate by Address |
| dotnet | ConsolidateByID1 | True (✓) or False | Edit | Consolidate by AccountID |
| dotnet | CopyPlannedToActuals | True (✓) or False | Edit | This enables copy planned to actuals on the stops page.. was teleflora custom functionality |
| dotnet | DefaultDisplayUserAlias | Delivery Instructions, Customer PO, Job Name, FixedTime, Address | Edit | Configuration to display up to two User Fields where applicable. Please enter comma separated aliases (value from TBLUSERFIELDLIST.ALIAS column). Ex: SpcInstr,LoadID |
| dotnet | deletegpsxmlfile | TRUE | Edit | If false, GPS data XML received from 3rd party application or sync service will not be saved. |
| dotnet | DRAlgorithmType | Regular | Edit | Configures the algorithm type settings |
| dotnet | DRGeocodingFallbackLevel | Level1 | Edit | Determines what action needs to be taken for Geocoding Fallback Level. |
| dotnet | EditableUserFields | | Edit | Determines a list of user fields which can be edited directly on the stop summary page. Comma delimit the aliases. |
| dotnet | EMAILHEADERACCOUNTID | | Edit | Alias for AccountID |
| dotnet | EMAILHEADERACCOUNTNAME | | Edit | Alias for Account Name |
| dotnet | EMAILHEADERETA | | Edit | Alias for ETA |
| dotnet | EMAILHEADERLOADID | | Edit | Alias for LoadID |
| dotnet | EMAILHEADERORDERID | | Edit | Alias for OrderID |
| dotnet | EMAILHEADERSEQUENCE | | Edit | Alias for Seq |
| dotnet | EMAILHEADERSTATUS | | Edit | Alias for Order Delivery status |
| dotnet | EMAILQTYFIELD1 | | Edit | Qty field 1 in email |
| dotnet | EMAILQTYFIELD2 | | Edit | Qty field 2 in email |
| dotnet | EMAILUSERFIELD1 | User1 | Edit | Alias name for userfield1 |
| dotnet | EMAILUSERFIELD2 | User2 | Edit | Alias name for userfield2 |
| dotnet | EMAILUSERFIELD3 | User3 | Edit | Alias name for userfield3 |
| dotnet | EnableAssetSelectionOnDriverLogin | True (✓) or False | Edit | Determines if the Asset ID drop down should be shown on the driver login page. |
| dotnet | EnableD2Link | True (✓) or False | Edit | Enables D2Link-specific DRTrack functionality |
| dotnet | EnableDefaultCoordinatesToAccount Master | True (✓) or False | Edit | Enables Coordinates defaulting to the Account Master Lat/Lon when adding stops. no 0,0 |
| dotnet | EnableGeotab | True (✓) or False | Edit | Displays Export to Geotab button in routes page |
| dotnet | EnableHOS | True (✓) or False | Edit | Enables Peoplenet HOS |
| dotnet | enableInnovative | True (✓) or False | Edit | enable innovative specific functionality |
| dotnet | enableInnovative | True (✓) or False | Edit | enable innovative specific functionality |

| dotnet | EnableRouteBoardDefaultTo UnloadedStops | True (✓) or False | Edit | Checks or leaves unchecked all routes when opening RouteBoard. Set true if performance is slow. Disabled by default |
|--------|------------------------------------------|-------------------|------|-----------------------------------------------------------------------------------------------------------------------|
| dotnet | EnableRouteExportXml | True (✓) or False | Edit | Displays Route Export Xml button in routes page when enabled |
| dotnet | EnableShiftBuilding | True (✓) or False | Edit | Decides whether or not wave/shift building is available. |
| dotnet | EnableTimeWindowCodes | True (✓) or False | Edit | Decides whether or not time window codes are available. |
| dotnet | EnableTMW | True (✓) or False | Edit | Enables Export to TMW functionality. |
| dotnet | ENABLETOMTOM | True (✓) or False | Edit | Enables ENABLETOMTOM-specific DRTrack functionality |
| dotnet | enableTripSheetStatus | True (✓) or False | Edit | Enables Trip Sheet Status Column in Route List on Route Board |
| dotnet | EnableUleQtyFields | True (✓) or False | Edit | Determine if volume fields should be classified as ULE (routable) vs non-routable |
| dotnet | EnableUPL | True (✓) or False | Edit | Displays Export to UPL button in routes page |
| dotnet | EnableXata | True (✓) or False | Edit | Displays Export to Xata button in routes page |
| dotnet | EnableXRS | True (✓) or False | Edit | Displays Export to XRS button in routes page |
| dotnet | EnforceSecurityForDataExchange | True (✓) or False | Edit | This prevents unauthenticated data download |
| dotnet | ExpandStopSummaryMenu | True (✓) or False | Edit | Enables expanding stops summary page button menu to the pre-7x layout |
| dotnet | ExportToTable | True (✓) or False | Edit | Sets caption for the export to table button in routes page |
| dotnet | GeocodeOrdersBeforeRouting | True (✓) or False | Edit | Geocode orders before routing |
| dotnet | GeocodingEngine | PCMiler | Edit | Geocoding engine type |
| dotnet | GeocodingURL | http://geocoding service. routetracking. com/DRRouting Service.svc | Edit | Geocoding service for street level data |
| dotnet | GoogleAPIKey | AlzaSyCBgOilIsjw koYOqDTzQgo3X nPNkrAK-Ow | Edit | Google API key to use google geocoding service. |
| dotnet | GoogleGeocodeAccuracyLevel | Approximate | Edit | Determines what action needs to be taken for Google Geocode Accuracy Level. |
| dotnet | gpsmapspeed | 65 | Edit | NULL |
| dotnet | IgnoreEQCodeOnConsolidation | True (✓) or False | Edit | This flag will determine whether or not DRTrack will use EQCodes when consolidating. |
| dotnet | isTeleflora | True (✓) or False | Edit | Enables Teleflora Specific functionality |
| dotnet | LastPingTime | 10/31/2017 9:16 | Edit | Last ping time |
| dotnet | LoginBufferIntervalInMinute | 0 | Edit | Buffer for login time |

| dotnet | LoginStatusEmailNotification | True (✓) or False | Edit | Enable or Disable Processing of login status email notifications |
|---|---|---|---|---|
| dotnet | MaxEmailsPerSession | 90 | Edit | Determines the maximum number of emails that BEmailManager will allow to be sent in one SmptClient session. |
| dotnet | MaxNumberOfRoutesToOptimize Between | 5 | Edit | The maximum number of routes that can be selected for optimization between. |
| dotnet | MaxNumberOfRoutesToOptimize Within | 10 | Edit | The maximum number of routes that can be selected for optimization. |
| dotnet | MaxOrderImportThreadCount | 1 | Edit | The number of threads used in the order import process. |
| dotnet | MergeIncomingOrderImportQueues | True (✓) or False | Edit | Determines whether Incoming OrderImportQueues need to be merged |
| dotnet | milesadjustmentpercent | 10 | Edit | NULL |
| dotnet | NotLoggedInEmailPriorityRoutesOnly | True (✓) or False | Edit | Modifies the default RoutesNotLoggedIn logic to exclude routes which are not priority routes. |
| dotnet | ondutywithdrivetime | True (✓) or False | Edit | NULL |
| dotnet | OnFinalizeActions | ApplyFinalize Lock\|DeleteFake Orders | Edit | Enables optional behaviors when Finalize occurs |
| dotnet | ONFINALIZELEAVEORDER | True (✓) or False | Edit | Defines the default behavior for the finalize route process |
| dotnet | OrderManagementDisplayUserAlias | Job Name,Item Number Description | Edit | Configuration to display up to two User Fields in order management module. Please enter comma separated aliases (value from TBLUSERFIELDLIST.ALIAS column). Ex: SpcInstr,LoadID |
| dotnet | PERFORMORDERIMPORTHASHING | True (✓) or False | Edit | Determine whether or not the order import process should perform the hashing algorithm. |
| dotnet | RemoveEmptyLegs | True (✓) or False | Edit | Enables removal of empty legs from routes when moving or unloading stop or route |
| dotnet | RestoreFakeOrders | True (✓) or False | Edit | Decides whether or not fake orders should be restored when real orders are deleted. |
| dotnet | RouteBoardGeocodeOnlyUngeocoded Default | True (✓) or False | Edit | Routeboard - Geocode Only Ungeocoded Records Default |
| dotnet | SecondaryGeocoder | Google | Edit | Determines what action needs to be taken for Secondary Geocoder. |
| dotnet | SetStopSummaryViewModeToOrders | True (✓) or False | Edit | This defaults the stop summary grid view to "Orders" |
| dotnet | ShiftBuildingMatchCriteria | TimeWindows | Edit | Decides how orders are determined to match a shift. Either by Time Window or by Estimated Ship DateTime |

| dotnet | ShiftBuildingMode | TimeWindowCo des | Edit | Decides how Shifts are determined in the system. One can either use "Custom" shifts ot "TimeWindowCodes". |
|---|---|---|---|---|
| dotnet | SMTPENABLESSL | True (✓) or False | Edit | true/false |
| dotnet | SMTPFROMADDRESS | | Edit | from address that is displayed in the recipients email |
| dotnet | SMTPFROMNAME | | Edit | from name that is displayed in recipients email |
| dotnet | SMTPLOGINNAME | | Edit | login info needed for smtp authentication |
| dotnet | SMTPLOGINPASSWORD | | Edit | password needed for smtp authentication |
| dotnet | SMTPPORT | | Edit | smtp port number |
| dotnet | SMTPSERVERNAME | | Edit | smtp address |
| dotnet | TRACKACCOUNTROUTEAUDIT | None | Edit | Enables tracking of the Account Route Audit |
| dotnet | UpdateUserFieldValuesIfExists | True (✓) or False | Edit | Determines whether or not user field values will be updated by the PeopleNet sync service if they already exist in DRTrack. |
| dotnet | UseAccountTWForServiceWizard | True (✓) or False | Edit | Set to false to use the geolocation algorithm to get nearby account time windows, true to pull the Account Master time windows |
| dotnet | UseDistanceEngine | True (✓) or False | Edit | Use the TMW Distance Engine to generate distance entries rather than using crow-fly distance. |
| dotnet | UseGoogleForGeocoding | True (✓) or False | Edit | Use google for geocoding. |
| dotnet | UseShiftsForOrders | True (✓) or False | Edit | Decides whether or not to use shifts when receiving an order and assigning the time window |
| dotnet | UseZeroVolumeForCloning | True (✓) or False | Edit | Use zero for quantity volume during cloning process. |
| DotNet | DefaultEnableConfirmationOnRoute Board | True (✓) or False | Edit | Determines if Confirmation Popup Window on RouteBoard is enabled by default |
| DotNet | EnableTripSheetOnRouteBoard | True (✓) or False | Edit | Enables Print TripSheet button and TripSheet Status indicator on RouteBoard |
| DotNet | OpenPatternsAndDatesOnOrders BeforeBuild | True (✓) or False | Edit | Opens order delivery window patterns and earliest/latest date when building routes. |
| DotNet | ShowGeoresultUnloadedStopsRoute Board | True (✓) or False | Edit | Shows GeoResult column on Unloaded Stops Grid on Route Board |
| DotNet | ShowRoutesStopCountOnRoute Board | True (✓) or False | Edit | Shows Stop Count column on Route List on Route Board |
| geocoding | RunAddressCleanup | True (✓) or False | Edit | Determines whether or not to run address cleanup routines when geocoding |
| geocoding | UpdateAddressAfterCleanup | True (✓) or False | Edit | Determines whether or not to update an account with updated |

| | | | | | information from Address Cleanup |
|---|---|---|---|---|---|
| GEOTAB | Database | | | Edit | Geotab Database |
| GEOTAB | Password | | | Edit | Geotab Password |
| GEOTAB | Server | | | Edit | Geotab Server |
| GEOTAB | Username | | | Edit | Geotab Username |
| iBright | AssetsBaseURL | https://api.ibright.info/v1 | | Edit | URL to Sync Drivers and Devices in iBright with DRTrack. |
| iBright | EnableIBright | True (✓) or False | | Edit | iBright Integration. Options true or false. |
| iBright | JobsBaseURL | https://flow.ibright.info/vendorapi/v1 | | Edit | URL to export Routes/jobs to iBright. |
| iBright | UseEditIdentifierAsDeviceID | True (✓) or False | | Edit | Default Value false. This option is used while synchronizing Device. If false, XML element Name will be used as DeviceID. If true, XML element EditIdentifier will be used as DeviceID. |
| iBright | UseEditIdentifierAsDriverID | True (✓) or False | | Edit | Default Value false. This option is used while synchronizing Driver. If false, XML element LinkingCode will be used as DriverID. If true, XML element EditIdentifier will be used as DriverID. |
| login | EarlyLoginBuffer | 4 | | Edit | Manual logins must fall within X hours before the planned start time. Administrators can override. |
| login | EarlyLogoffBuffer | 12 | | Edit | Manual logins must fall within X hours before the planned end time. Administrators can override. |
| login | LateLoginBuffer | 4 | | Edit | Manual logins must fall within X hours after the planned start time. Administrators can override. |
| login | LateLogoffBuffer | 12 | | Edit | Manual logoffs must fall within X hours after the planned end time. Administrators can override. |
| login | UseSingleSignOn | True (✓) or False | | Edit | Determines whether or not to use a configured SSO Service for login. |
| NavTrak | ApplicationId | | | Edit | Credentials to access NavTrak webservice. |
| NavTrak | DisplayAddress | True (✓) or False | | Edit | Display Address in Garmin unit in detail section. Options true or false. |
| NavTrak | DisplayOrderId | True (✓) or False | | Edit | Display OrderId in Garmin unit in detail section. Options true or false. |
| NavTrak | EnableNavTrak | True (✓) or False | | Edit | NavTrak Integration. Options true or false. |
| NexTraq | ApplicationId | True (✓) or False | | Edit | Credentials to access NexTraq webservice. |
| NexTraq | DisplayAccountId | True (✓) or False | | Edit | Display AccountId in message section. Options true or false. |

| | | | | |
|---|---|---|---|---|
| NexTraq | DisplayAccountName | True (✓) or False if not checked | Edit | Display AccountName in message section. Options true or false. |
| NexTraq | DisplayAddress | True (✓) or False | Edit | Display Address in message section. Options true or false. |
| NexTraq | DisplayOrderId | True (✓) or False | Edit | Display OrderId in message section. Options true or false. |
| NexTraq | DisplayPlannedArrivalDeparture | True (✓) or False | Edit | Display Planned Arrival and departure in message section. import orderOptions true or false. |
| NexTraq | EnableNexTraq | True (✓) or False | Edit | NexTraq Integration. Options true or false. |
| NexTraq | NexTraqLastPingtime | | Edit | Default value blank. If blank, when NexTraq executes for first time, INIValue will be updated to CurrentDate. If older than 7 days, INIVAlue defaulted to CurrentDate. |
| OMM | AcceptableGeoResultsForReservation Merge | Manual,Level0,L evel1,Z1 | Edit | Comma delimited list of acceptable georesults for orders to be merged onto reservations. |
| OMM | CreateShipToWithinOMM | True (✓) or False | Edit | Determines whether or not create Ship To accounts as part of the OMM process |
| OMM | EnableValidateGeoResultsFor ReservationMerge | True (✓) or False | Edit | Determines whether or not the georesult of incoming orders determines whether or not to merge the order onto reservations. |
| OMM | GeocodeReservationOrdersBefore Merging | True (✓) or False | Edit | Determines whether or not to geocode orders with reservations before merging. |
| OMM | OverwriteAccountEQCodeWith in OMM | True (✓) or False | Edit | Enables updating the account eq code when updating from the OMM. |
| OMM | UpdateEqCodeWithinOMM | True (✓) or False | Edit | Updates Eq Code within OMM |
| OMM | UpdateShipToLatLongsInOMM | True (✓) or False | Edit | Set to true to use update the lat/longs when the address matches the ship to and the lat/longs dont, false to not overwrite with new lat/longs on matching address |
| OMM | GeocodeAndRescheduleRouteOn AddressChangeWithinOMM | True (✓) or False | Edit | Determines if Modify Orders sent through OMM get geocoded and their routes rescheduled during Import Orders scheduled task |
| OMM | GeocodeAndRescheduleRouteOn AddressChangeWithinOMM | True (✓) or False | Edit | Determines if Modify Orders sent through OMM get geocoded and their routes rescheduled during Import Orders scheduled task |
| OMM | UPDATEACCOUNTLATLONGIN OMM | True (✓) or False | Edit | Update Account Lat Long In OMM |
| OMM | UpdateFinalizedOrdersInOMM | True (✓) or False | Edit | Allows finalized orders to be updated through the OMM. |

| OMM | UpdateFixedTimeInOMM | True (✓) or False | Edit | Fixed Time field in Account Master will be updated when this setting is set to true |
|---|---|---|---|---|
| OMM | UpdatePriorityBumpInOMM | True (✓) or False | Edit | Priority Bump Factor field in Account Master will be updated when this setting is set to true |
| OMM | UpdatePriorityInOMM | True (✓) or False | Edit | Priority field in Account Master will be updated when this setting is set to true |
| peoplenet | DispatchVehicleNumbersWith Preassignments | True (✓) or False | Edit | Determine whether or not to send the vehicle_number with route exports. Turning this ON will automatically log the route in. |
| peoplenet | EnablePeoplenet | True (✓) or False | Edit | Configuration to enable or disable Peoplenet in DRTrack |
| peoplenet | PEOPLENETDATA1 | | Edit | userfield alias goes in here |
| peoplenet | PEOPLENETDATA2 | | Edit | userfield alias goes in here |
| peoplenet | PEOPLENETDATA3 | | Edit | userfield alias goes in here |
| peoplenet | PEOPLENETDATA4 | | Edit | userfield alias goes in here |
| peoplenet | PEOPLENETDATA5 | | Edit | userfield alias goes in here |
| peoplenet | PeoplenetQtyAlias | | Edit | Determines the quantity field that will be processed to show as planned quantity in PeopleNet devices. |
| peoplenet | PeopleNetQuantitySplitPickupAnd Delivery | True (✓) or False | Edit | Show the PeopleNetQtyAlias quantity field as a dichotomy of pickup/ delivery |
| peoplenet | ProcessSequenceNumberWith CustomerID | True (✓) or False | Edit | Use customer ID to determine the true sequence number between PeopleNet and DRTrack. This is more accurate for preventing desyncs. |
| peoplenet | UpdateLatAndLongInLandmark | True (✓) or False | Edit | Possible values (true,false). False:- lat & long values will not be sent from DRTrack to peoplnet while updating the landmark table; True:- when updating the landmark table, Lat & long values from DRTrack will also be sent to peoplenet system. |
| peoplenet | UseShiptoInLandmark | True (✓) or False | Edit | Possible values (true,false). False:- use accountmaster address in landmark table; True:- use shipto address in landmark table. |
| Report | ReportExecActDomainName | Hosted | Edit | Enter the Windows account domain name used to access the SQL report. |
| Report | DefaultReportQtyAlias | Pallet Qty,Hazmat | Edit | Default Qty Alias Fields for Report |
| Report | DefaultReportUserAlias | LOADID,OrigSeq | Edit | Default User Alias Fields for Report |
| resources | AuthCompanyName | | Edit | Determines the company authentication credential used to communicate with the resource |

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| | | | | | service. Leave blank to configure automatically. |
| resources | AuthPassword | | | Edit | Determines the password authentication credential used to communicate with the resource service. Leave blank to configure automatically. |
| resources | AuthUsername | | | Edit | Determines the username authentication credential used to communicate with the resource service. Leave blank to configure automatically. |
| resources | Url | http://resources. routetracking. com/ | | Edit | Configures the Url of the service DRTrack will use for storing and retrieving large resources. |
| Resources | ImageMimeType | image/jpeg | | Edit | Tells the image processor what file type to save images as. |
| Resources | ImageResizeMode | maximum | | Edit | Tells the image processor how to treat image size and aspect ratio. |
| Resources | MaxHeight | 1024 | | Edit | Provides the height option for the image processor. |
| Resources | MaxWidth | 1024 | | Edit | Provides the width option for the image processor. |
| Resources | ProcessImages | True (✓) or False | | Edit | Upload images with post- processing options. |
| routeupload | AutoExportPeopleNet | True (✓) or False | | Edit | Enable or Disable Exporting routes to PeopleNet on Upload |
| routeupload | CommitTransactionForEveryRoute | True (✓) or False | | Edit | Forces the route upload module to commit the current database transaction for each and every route. This is needed for very large route uploads. |
| routeupload | DoNotUseTransactionsDuringRoute Upload | True (✓) or False | | Edit | Determine whether or not transactions should be used during the route upload process at all. |
| routeupload | EmailRouteManifestToDrivers | True (✓) or False | | Edit | Enable or Disable Processing of login status email notifications |
| routeupload | EnableShipToForRouteUpload | True (✓) or False | | Edit | Enables shipto for routeupload |
| routeupload | SendOrderScheduleEmailOnUpload | True (✓) or False | | Edit | Enable or Disable sending Order Schedule notifications on export |
| routeupload | UpdateAccountMasterWithinOMM | True (✓) or False | | Edit | This flag will update Account Master contact and address information with new information from the Order Management Module. |
| routeupload | UpdateEditableTruckUserInfo | True (✓) or False | | Edit | Determines if editable truck user fields need to be shown or not. |
| RouteUpload | AutoGenerateProfileMaster | True (✓) or False | | Edit | Allow the system to automatically generate a profile master for the given branch ID if one does not exist. |
| stopdetection | AutoLogoffMaxGracePeriod | 180 | | Edit | Maximum number of minutes vehicle can be stationed at the |

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| | | | | terminal without triggering auto-logoff even if other minimums have not been met. |
| stopdetection | MatchStopListWithLegAndSeq Only | True (✓) or False | Edit | This flag affects services which provide StopLists in lieu of GPS detection. If true, stops will be matched based on Leg & Seq and not AccountIDs. |
| stopdetection | MinPercentageRequiredForA uto Logoff | | Edit | Minimum percentage of route completion required before AutoLogoff can be triggered. |
| stopdetection | MinRequiredDurationForAutoLo goff | 30 | Edit | Minimum number of minutes that the vehicle is at the terminal before auto logoff can engage. |
| stopdetection | MinStopsRequiredForAutoLogo ff | | Edit | Minimum number of actual stops that must be detected for AutoLogoff to be triggered. |
| stopdetection | UtilizeGPSTrailWithFormBased Arrival Departure | True (✓) or False | Edit | Determine whether to use historical GPS data to help buffer form arrival/ departure in addition to fixed time. |
| StopDetection | DetectZeroMinStopsAtPlnStopL oc | True (✓) or False | Edit | Legacy configuration option. Currently unused. Set StopDetectionDurationNrPlnStop to 0 to achieve this. |
| StopDetection | DetectZeroMinStopsAtTermLoc | True (✓) or False | Edit | Legacy configuration option. Currently unused. Set StopDetectionDurationNrTerm to 0 to achieve this. |
| StopDetection | MatchMultipleStopsWithSame AccountID | True (✓) or False | Edit | Default value false. If false, stop matching will cease when a stop is attempting to be matched to multiple instances of the same AccountID. If true, stops will continue matching all occurrences inside a geofence regardless of accountID. |
| StopDetection | MatchNonContiguousStops | True/False | Edit | Allows matching multiple stops that satisfy the conditions of a geofence without checking to make sure their sequence numbers are contiguous. |
| StopDetection | ProcessEmailInSeperateThread | True (✓) or False | Edit | Property to configure the delay email notification needs to be processed on a separate thread. |
| StopDetection | StopDetectionDuration | 15 | Edit | Determines the minimum duration required to consider a series of points as a stop. |
| StopDetection | StopDetectionDurationNrPlnSto p | 10 | Edit | Overrides StopDetectionDuration for points within a planned stop geofence. |
| StopDetection | StopDetectionDurationNrTerm | 3 | Edit | Overrides StopDetectionDuration for points within a terminal geofence. |

| StopDetectio n | StopDetectionSpeed | 15 | Edit | Maximum speed allowed for a point to be considered in stop detection logic. |
|---|---|---|---|---|
| StopDetectio n | StopDetectionStopGeofence | 1500 | Edit | Default geofence for a planned stop location. Can be overridden at Account Master level. |
| StopDetectio n | StopDetectionTerminalGeofence | 2500 | Edit | Default geofence for a planned terminal. |
| StopDetectio n | StopMatchingStopGeofence | 1500 | Edit | Determine the geofence to use for matching a stop to a planned location. Dial this in if your stops are clustered nearby one another. |
| StopDetectio n | StopMatchingTerminalGeofence | 2500 | Edit | Determine the geofence to use for matching a stop to a terminal location. Dial this in if your stops are clustered nearby one another. |
| StopDetectio n | StopMergingDistance | 1500 | Edit | Determine the maximum allowed distance for two stops to be merged together into one stop. |
| StopDetectio n | StopMergingDuration | 5 | Edit | Determine the maximum allowed duration between consecutive stops for the stops to be merged together into one stop. |
| TELETRAC | AccountId | | Edit | Credentials to access TeleTrac webservice. |
| TELETRAC | EnableTeleTrac | True (✓) or False | Edit | Enables TeleTrac |
| TELETRAC | Password | | Edit | Credentials to access TeleTrac webservice. |
| TELETRAC | RouteInfo | | Edit | Property for route information |
| TELETRAC | StopInfo | | Edit | Property for stop information |
| TELETRAC | UserName | | Edit | Credentials to access TeleTrac webservice. |
| TOMTOM | OrderDisplayFormat | {Customer Name}\n | Edit | Determines the format for order detail data that is sent to WebFleet/ TomTom devices. |
| TOMTOM | OrderNoFormat | {AccountID}_ {OrderID} | Edit | Determines the format of the order number sent to WebFleet/ TomTom |
| TOMTOM | Account | Traxxisgps | Edit | Account |
| TOMTOM | Password | xxxxxxx | Edit | Password |
| TOMTOM | Username | Thom | Edit | companyname\username |
| ui | AllowModifyStopAccountMaster | True (✓) or False | Edit | Determines if stop needs to be updated with new Account Master information. |
| ui | BarCodeFields | confphn={user:D elivery Confirm Phone}\|job={use r:Job Name}\|confeml ={user:Delivery Confirm Email}\|podphn={ user:Proof of Delivery | Edit | Token string for bar code user fields |

| | | | Phone}|podeml= {user:Proof of Delivery Email}| | | |
|---|---|---|---|---|---|
| ui | CalendarQuantityDisplayLabel | PT | Edit | Displays user set Alias on route calendar appointment block. |
| ui | CalendarTruckCapacityQtyAlias | True (✓) or False | Edit | Displays QTY Alias on route calendar appointment block. |
| ui | DefaultDriverBreakTime | 0.5 | Edit | Allows user to set a default driver break time in hours. |
| ui | DefaultLoadDayCode | 1 | Edit | Set default Day code for Route Board Master Route Search |
| ui | EnableAutoRefreshOnOrderTracking | True (✓) or False | Edit | Enables a user to auto-refresh the order tracking page |
| ui | EnableBuildRoutes | True (✓) or False | Edit | Determines whether or not the Build Routes option is available for use. |
| ui | EnableSaveUserRouteStartTimeChanges | True (✓) or False | Edit | Keeps start times changed by users when optimizing |
| ui | ExpandedStopSummaryMenu | True (✓) or False | Edit | Enables expanding stops summary page button toolbar to the pre-7x (expanded) layout |
| ui | FixedRoutesAction | None | Edit | Determines what action needs to be taken for fixed routes. |
| ui | HazmatLimit | 1000 | Edit | Shows Hazmat warning on Delivery sheet if total route exceeds amount. |
| ui | LassoStopsAction | Build new route | Edit | Determines what action needs to be taken when stops are lassoed. |
| ui | LineItemDetailDisplayQtyFields | Quantity,Hazmat | Edit | Determines the quantity field that will be displayed when viewing line item details. |
| ui | LineItemDetailDisplayUserFields | Item Number,Item Number Description | Edit | Determines the user fields that will be displayed when viewing line item details. |
| ui | MoveRoutesBetweenBranches | True (✓) or False | Edit | Determines if move routes between branches button needs to be enabled or not. |
| ui | OrderBlockTokenString | {CUSTOMERNAME}|Pallets: {Qty:Pallet Qty}|{ORDERID}|{CITY}, {STATE} | Edit | Determines what fields show on Order Block in Detail View of Calendar |
| ui | OrderCardQtyAlias1 | True (✓) or False | Edit | Displays QTY Alias 1 on order card. |
| ui | OrderCardQtyAlias2 | True (✓) or False | Edit | Displays QTY Alias 2 on order card. |
| ui | OrderCardUsrFldAlias1 | True (✓) or False | Edit | Displays QTY Alias on order card. |
| ui | OrderCardUsrFldAlias2 | True (✓) or False | Edit | Displays QTY Alias on order card. |
| ui | OrderSearchDateLimit | | Edit | Sets the limit of the number of days to be returned |
| ui | OrderToolTipTokenString | Customer Name: {CUSTOMERNAME}|Address: | Edit | Determines what fields show on Order ToolTip in Detail View of Calendar |

| | | {Address1}\|City, State: {CITY}, {STATE}\|Pallet Qty: {qty:Pallet Qty}\|{TIMEWINDOWS}\|Job Name: {user:Job Name}\|Customer PO: {user:Customer PO}\|Order Number: {ORDERID}\|Notes: {user:Delivery Instructions} | | |
|---|---|---|---|---|
| ui | ReservationBlockTokenString | | Edit | Determines what fields show on Reservation Block in Detail View of Calendar |
| ui | ReservationToolTipTokenString | | Edit | Determines what fields show on Reservation Tooltip in Detail View of Calendar |
| ui | SearchQtyFields | Weight,Quantity | Edit | The qty fields on the application search cards. |
| ui | SearchUserFields | Job Name,Proof Of Delivery Email | Edit | The user fields on the application search cards. |
| ui | ShowAccountAddress | True (✓) or False | Edit | Determines if account address needs to be shown in the routeboard and routesummary page |
| ui | ShowActualDeliveryQuantitiesInStopsPage | True (✓) or False | Edit | show the actual qty in stop summary page |
| ui | ShowAddressOnStopsPage | True (✓) or False | Edit | Displays the Address column/field on the stop summary page |
| ui | ShowEqCode | True (✓) or False | Edit | Determine whether or not to show the EqCode column where applicable. |
| ui | ShowLoadAndAssignForSuggest Routes | True (✓) or False | Edit | Determines if load and assign needs to be shown in suggest routes. |
| ui | ShowMasterSearch | True (✓) or False | Edit | Enables search for order |
| ui | ShowOrderBlockConfiguredFields Only | True (✓) or False | Edit | Show configured fields setting for order block |
| ui | ShowTruckCapacity | True (✓) or False | Edit | Determine whether or not the truck capacity column will show in the routes page |
| ui | ShowTruckCapValueOnRouteCalendarAppointment | True (✓) or False | Edit | Displays truck loaded/capacity on route calendar appointment block. |
| ui | SortRoutesByDisplayName | True (✓) or False | Edit | Set sorting routes by display name property |
| ui | SuggestStopsDisplayUserFields | | Edit | Select up to (2) user field aliases to show in the suggest stops window for each unloaded order. |

| ui | TruckCapacityQtyAlias | Pallet Qty, Hazmat | Edit | Determine which quantity alias to use for showing truck capacity. Default implies the first Qty. |
|---|---|---|---|---|
| ui | UseDeliverySheet | True (✓) or False | Edit | Use the Driver Delivery Sheet |
| ui | UseTruckProfileForSuggestRoutes | True (✓) or False | Edit | use truck profiles for route suggestions |
| UI | HideTempDrivers | True (✓) or False | Edit | Hides temporary drivers from driver list drop downs. |
| UPL | DateFormat | | Edit | The format used for dates |
| UPL | EndingTerminal | True (✓) or False | Edit | Export the ending terminal |
| UPL | HeaderRecord | True (✓) or False | Edit | Export the header record |
| UPL | LineItemLevel | True (✓) or False | Edit | Include fields at the line item level. |
| UPL | OutPutFileName | | Edit | The name of the output file |
| UPL | OutPutFilePath | | Edit | The server path to the output file |
| UPL | OutPutFileSuffix | | Edit | The suffix of the output file |
| UPL | QtyFieldAlias1 | Weight | Edit | The qty field to use for SFQTY001 |
| UPL | QtyFieldAlias10 | | Edit | The qty field to use for SFQTY0010 |
| UPL | QtyFieldAlias2 | | Edit | The qty field to use for SFQTY002 |
| UPL | QtyFieldAlias3 | | Edit | The qty field to use for SFQTY003 |
| UPL | QtyFieldAlias4 | | Edit | The qty field to use for SFQTY004 |
| UPL | QtyFieldAlias5 | | Edit | The qty field to use for SFQTY005 |
| UPL | QtyFieldAlias6 | | Edit | The qty field to use for SFQTY006 |
| UPL | QtyFieldAlias7 | | Edit | The qty field to use for SFQTY007 |
| UPL | QtyFieldAlias8 | | Edit | The qty field to use for SFQTY008 |
| UPL | QtyFieldAlias9 | | Edit | The qty field to use for SFQTY009 |
| UPL | StartingTerminal | True (✓) or False | Edit | Export the starting terminal |
| UPL | TimeFormat | H:mm | Edit | The format used for times |
| UPL | TUserFieldAlias1 | | Edit | The user field to use for TFUSERFLD001 |
| UPL | TUserFieldAlias10 | | Edit | The user field to use for TFUSERFLD0010 |
| UPL | TUserFieldAlias2 | | Edit | The user field to use for TFUSERFLD002 |
| UPL | TUserFieldAlias3 | | Edit | The user field to use for TFUSERFLD003 |
| UPL | TUserFieldAlias4 | | Edit | The user field to use for TFUSERFLD004 |
| UPL | TUserFieldAlias5 | | Edit | The user field to use for TFUSERFLD005 |
| UPL | TUserFieldAlias6 | | Edit | The user field to use for TFUSERFLD006 |
| UPL | TUserFieldAlias7 | | Edit | The user field to use for TFUSERFLD007 |
| UPL | TUserFieldAlias8 | | Edit | The user field to use for TFUSERFLD008 |
| UPL | TUserFieldAlias9 | | Edit | The user field to use for TFUSERFLD009 |
| UPL | UserFieldAlias1 | | Edit | The user field to use for SFUSERFLD001 |
| UPL | UserFieldAlias10 | | Edit | The user field to use for SFUSERFLD0010 |

| UPL | UserFieldAlias2 | | Edit | The user field to use for SFUSERFLD002 |
|---|---|---|---|---|
| UPL | UserFieldAlias3 | | Edit | The user field to use for SFUSERFLD003 |
| UPL | UserFieldAlias4 | | Edit | The user field to use for SFUSERFLD004 |
| UPL | UserFieldAlias5 | | Edit | The user field to use for SFUSERFLD005 |
| UPL | UserFieldAlias6 | | Edit | The user field to use for SFUSERFLD006 |
| UPL | UserFieldAlias7 | | Edit | The user field to use for SFUSERFLD007 |
| UPL | UserFieldAlias8 | | Edit | The user field to use for SFUSERFLD008 |
| UPL | UserFieldAlias9 | | Edit | The user field to use for SFUSERFLD009 |
| Whiteboard | CreateNewRouteWhenDragging Stop ToEmptySlot | True (✓) or False | Edit | Creates a new route on the resource planner when a planned stop is dragged to an empty slot in Details view. If false: Reassign route |
| Whiteboard | DefaultDaysAheadForRoutes | 0 | Edit | Defaults the calendar view to show routes X days ahead of the scheduler. |
| Whiteboard | DefaultDaysAheadForUnloaded Orders | 7 | Edit | Defaults the calendar view to show orders X days ahead of the scheduler. |
| Whiteboard | DefaultDaysBehindForRoutes | 0 | Edit | Defaults the calendar view to show routes X days behind the scheduler. |
| Whiteboard | DefaultDaysBehindForUnloaded Orders | 7 | Edit | Defaults the calendar view to show orders X days behind the scheduler. |
| Whiteboard | DefaultPromptAcceptBehavior | AlwaysAccept | Edit | Determines the default AlwaysAccept behavior for the scheduler prompts. |
| Whiteboard | DefaultPromptBehavior | AlwaysPrompt | Edit | Determines the initial prompt behavior when working with the scheduler. |
| Whiteboard | EndOfBusinessDay | 21:00:00 | Edit | Declares the end of the business day for the default calendar view. (HH:mm:ss) |
| Whiteboard | LineItemDisplayQtyFields | Quantity | Edit | Determines which quantity fields to show for line items in the whiteboard. |
| Whiteboard | LineItemDisplayUserFields | Item Number,Item Number Description | Edit | Determines which user fields to show for line items in the whiteboard. |
| Whiteboard | MinutesPerRow | 15 | Edit | Declares how large time increments are defined for the whiteboard. |
| Whiteboard | RouteCalendarDefaultResource View | Assets | Edit | Determines the default resource view in the whiteboard. |

| Whiteboard | RouteCalendarDefaultView | Details | Edit | Determines the default view in the whiteboard. |
|---|---|---|---|---|
| Whiteboard | RowHeight | 15 | Edit | Defines how tall (in pixels) a single row in the scheduler displays. |
| Whiteboard | Show24HoursByDefault | True (✓) or False | Edit | Defaults the calendar view to show all 24 hours by default. |
| Whiteboard | ShowNotesPanel | True (✓) or False | Edit | Shows notes panel on Route Calendar |
| Whiteboard | ShowUnloadedOrdersByDefault WhenViewingMap | True (✓) or False | Edit | Determines whether or not the unloaded stops layer will be visible by default when viewing the map in the route calendar. |
| Whiteboard | StartOfBusinessDay | 6:00:00 | Edit | Declares the beginning of the business day for the default calendar view. (HH:mm:ss) |
| Whiteboard | UnloadedOrderDragDropBehavior | Initialize | Edit | Determines how to handle unloaded orders that are dragged onto the resource planner. |
| Xata | ExportShipTo | True (✓) or False | Edit | Exports ShipTo address to Xata when set to true |
| Xata | ParentOrganizationID | 0 | Edit | ParentOrganizationID |
| Xata | Password | | Edit | Password |
| Xata | UnitQtyAlias | | Edit | Specify a qty alias that needs to be exported as units to Xata |
| Xata | Username | | Edit | companyname\username |
| Xata | WeightQtyAlias | | Edit | Specify a qty alias that needs to be exported as weight to Xata |
| XRS | CompanyLoginID | 599979 | Edit | XRS Company Login ID |
| XRS | ExportShipTo | True (✓) or False | Edit | Exports ShipTo address to XRS when set to true |
| XRS | Password | | Edit | XRS Password |
| XRS | ProductCodeAlias | | Edit | Specify a user field alias that needs to be exported as product code to XRS |
| XRS | RootOrganizationID | 0 | Edit | RootOrganizationID |
| XRS | UnitQtyAlias | | Edit | Specify a qty alias that needs to be exported as units to XRS |
| XRS | UnitQtyTypeAlias | | Edit | Specify a user field alias that needs to be exported as unit type to XRS |
| XRS | Username | VSawyer | Edit | companyname\username |
| XRS | WeightQtyAlias | | Edit | Specify a qty alias that needs to be exported as weight to XRS |

# Frequently Asked Questions

Note: Your routing procedures may be different than others. Some people route from the Calendar, some from the Map, and some route from the Route Board. The following questions/instructions are answered mostly with the assumption routing is performed from the Route Board. If you route from the Calendar or Map and have the same the question/problem, you can still use the same instructions, or try the resolution offered from the calendar. Some of the steps may be different on the Calendar, but you should be able to glean some direction from the answers provided.

**How do I see if a route has been Finalized?**

- Go to **Dispatch > Routes**

    1. Select search criteria

    2. *Finlized Routes* will display the letter "E" in a column in front of the route number

    3. Any modification to the route after finalization will trigger ⚠ to appear in front of the "E"

    4. ⚠ will also appear in various route detail screens/windows to advise of the route modifications

    5. Be sure to *Re-Finalize* to clear the warning and send the modified route details

**How do I see if a route has been Exported?**

- Go to **Dispatch > Routes**

    1. Select search criteria

    2. *Exported Routes* will display the 6-digit branch code in front of the original route number (ex. 121-AKR28016-W)

    3. Any modification to the route after finalization will trigger ⚠ to appear in front of the "E"

    4. *Re-Finalize* & *Re-Export* to PeopleNet to send modified route details to PeopleNet

**How to load Unloaded Stops?**

- Go to **Dispatch > Routes**

    1. Select the branch and date range, then select the *Load Unloaded Orders* button

    2. Select the *Load* button and review results, then close the confirmation window (note that only unloaded 'real' orders matching search criteria will be loaded/placed against existing route placeholders)

    3. Go back to Dispatch > Routes

    4. Select the branch and date range, then select the *Unloaded Stops* tab

    5. Select the stop(s) to be loaded, activate the desired route number(s), then indicate the desired sequence(s) and select *Add Stop*, OR

    6. Select the stop to be loaded, activate desired route number, then hold CTL key and mouse click on the map in the desired delivery position, OR

    7. Select stop to be loaded, then select *Suggest Routes*; load the stop on the desired route

**How do I move stops from one Master Route to another?**

- On the Same Day

    1. Go to **Dispatch > Routes**

    2. Select the branch, then select *Master Route*

    3. Select the *Day Code*, the route involved, and the stop sequence of the shipment

    4. Select *View Alternates* OR *Unload Stop* to process manually

- On a Different Day (Method A)

    1. Go to **Dispatch > Routes**

    2. Select the branch, then select *Master Route*

    3. Select the *Day Code* and the route involved

    4. Expand the shipment and select the *Order ID* hyperlink, then the *Account ID* hyperlink

    5. Change the delivery day pattern in the *Delivery Time Window*, then save & close

6. Change *Est Del Date* to a new date (stay within the same week, Sunday to Saturday)

7. Change the *Delivery Day Pattern* to a new day, then save & close

8. Select the stop sequence of the shipment

9. Select *View Alternates* OR *Unload Stop* to process manually

- On a Different Day (Method B)

    1. Go to Account Management

    2. Select the branch and Account ID

    3. Select the Account ID hyperlink and modify the required fields (*Delivery Days* & *Frequency*)

    4. Save the changes then return to *Account Management* main screen

    5. Select radial box of account

    6. Select *Schedule Service* and specify *Master Route Profile* to be adjusted from the drop down menu

    7. Select Go to Suggested Days

    8. Select to Delete existing services for this account

    9. Complete the Schedule Service Wizard process

- On Multiple Different Days

    1. Go to Account Management

    2. Select the branch and Account ID

    3. Select the Account ID hyperlink and modify the required fields (*Delivery Days* & *Frequency*)

    4. Save the changes then return to *Account Management* main screen

    5. Select radial box of account

    6. Select *Schedule Service* and specify *Master Route Profile* to be adjusted from the drop down menu

    7. Select Go to Suggested Days

    8. Select to Delete existing services for this account

    9. Complete the Schedule Service Wizard process

**How do I adjust Capacity Gauge values?**
- Method 1

    1. Go to **Route Board > Master Routes** and select the Day Code

    2. Make active the route to be changed

    3. Launch the *Truck Info* tab (right side of screen)

    4. Select *Edit* in the *Truck Info* window and the Truck Details box will open

    5. Under the *Qty Values* column, update each quantity value

    6. Save and reschedule

    7. Close additional browser tabs, then refresh the Route Board screen to view new values

- Method 2

    1. Go to **Admin > Master Routes** and select the branch

    2. Specify the *Day Code* and select the *Route #* hyperlink, then select the *Route Info* tab

    3. Select *Truck Info* and under the *Qty Values* column, update each quantity value

    4. Save and reschedule

    5. Close additional browser tabs to return to *Master Routes*

**How do I adjust the Start time of a Master Route?**

- Method 1
    1. Go to **Route Board > Master Routes** and select the Day Code
    2. Make active the route to be changed
    3. Launch the *Truck Info* tab on the right side of screen
    4. Select *Edit* in the *Truck Info* window and the *Truck Details* window will open
    5. Under the *Work Rules* column, update *EarlyStart* and *LateStart*
    6. Save and reschedule
    7. Close additional browser tabs and refresh the Route Board screen to view the new *Start Time*

- Method 2
    1. Go to **Admin > Master Routes** and select the branch
    2. Specify the *Day Code* and select the route # hyperlink, then select the *Route Info* tab
    3. Select *Truck Info* under the *Work Rules* column and update *EarlyStart* and *LateStart*
    4. Save and reschedule
    5. Close additional browser tabs, return to the *Master Routes* main page and refresh to view the modified route *Start Time*

**How do I find a specific order?**

- Go to **Customer Service > Order Management** and enter the order number

**How do I find a specific route?**

- Go to **Dispatch > Routes > Advanced Options** and enter the date range and route number

**Where do I find unloaded orders?**

- Go to **Dispatch > Route Board** and select branch, date range, and then *Search*
- Go to **Dispatch > Unloaded Orders** and select branch, date range, *Daily* or *Master*, and then *Search*

**Driver did not login to the route; how do I create a login?**

- Go to **Dispatch > Routes** and select branch, date range, and then *Search*
- Find the route you want to create a login
- Select NA under the *Driver* column
    1. Select the *DriverID* for the driver running the route
    2. Input the date/time the driver started the route
    3. Select the *DeviceID* of the tracking device
    4. Input the *TruckID*
    5. Input the starting Odometer value of the truck (may have to input 0 if unknown)
    6. Select Assign Driver

**What drivers are running behind today?**

- Route Details; far right column with symbol 🕒 (= Delay Timer)

**How to move stops from a current route**

- *Dispatch > Routes*; select branch and date range, then select the stop to move

- Select *View Alternates*; find the route or best option, then select load

## How do I see where my driver currently is?

- *Dispatch > Routes*; locate the correct route and select 🛣

## How do I export route to PeopleNet?

- *Dispatch > Routes*; select the box for the desired route and then select *Finalize > Export to PeopleNet*

## Adding new account to master routes

- *Admin > Account Management*
    1. Select Show me only accounts which are active but not schedule for service
    2. Select Account ID hyperlink
    3. Update any missing information
    4. Go through Schedule Service Wizard

## How do I Create a new Daily Route?

1. *Dispatch > Routes > Create Route*
2. Select the *Load Date* and *TruckID*, and *LoadID* (*RouteID*),
3. Create Route > Add stops
4. ** *Ensure* that the "Truck/Route" isn't currently a cloning Master Route (see Master Routes)
5. ** *Ensure* that the "Truck" has an EDay = 1 (see Truck Details)

## How do I log a driver off a Route?

- Method 1
    - Dispatch > Routes > Select search criteria > Driver Column Hyperlink for Route # > "Logoff" data fields > Specify Date > Specify Time > Indicate Correct Odometer End > LOG OFF > Export to PeopleNet
- Method 2
    - Homepage/Dashboard > Route Details > Driver Column Hyperlink for Route # > "Logoff" data fields > Specify Date > Specify Time > Indicate Correct Odometer End > LOG OFF > Export to PeopleNet

## How do I assign a different driver to a route?

1. **Daily Route**
    - *Preassigned*- Dispatch > Routes > Select search criteria > Driver Column Hyperlink for Route #
    > "Remove Pre-assignment" > Reselect Driver Column Hyperlink > Select Driver > Pre-assign
    - *Logged In*- NOTE: The active or Logged in Driver MUST log off the route and complete the "Route Release" process. You can then proceed to Pre-Assign the replacement driver > Dispatch
    > Route Details > Driver Column Hyperlink for Route # > Select Driver > Pre-Assign > Export to PeopleNet
2. **Master Route**
    - **To Change a Preassigned driver** - Admin > Master Routes > Select search criteria > Driver Column Hyperlink for Route # > "Remove Pre-assignment" > Reselect Driver Column Hyperlink > Select Driver & Record Driver ID # > Pre-assign new driver > Select Route # hyperlink of changed driver

> Route Info > Truck Info > Indicate <u>NEW</u> DriverID (recorded during earlier step) > Save All

**Un-consolidate and Move Orders/Stops**

● Dispatch > Routes Page > Select branch-date range > Identify Route > View Stop Summary > Select stop/order to be moved > Stop Actions > Move Stops > Select "To" Route from Dropdown > Indicate Stop Sequence > Select "Move Stops"

**Daily Tracking**

● Routes (see how drivers are doing, locate driver location)
● Dashboard (locate drivers who are delayed, snapshot of day)

**Daily Routing**

● Route Board (adding unloaded orders)
● Routes (finalize and export to PeopleNet, move driver to new route)

**Creating Dummy Orders**

● Dispatch > Create Order > Select Account to place order off of (Note* If the account does not exist within DRTrack you can create an account). Once an account is created, fill out create order information (time windows, order details, etc.) Click finish in the top right corner. That order can now be found under the unloaded orders tab.

**How to find an order within DRTrack?**

● Customer Service > Order management > select criteria (branch, account name, order number, etc.) > click search.

**How to add a new user?**

● Admin > Site > Users > Click Add New (top right corner) > Fill out the general information at top of screen (Note* be sure to select the appropriate branch at the bottom of the screen then click save).

**How to delete a user?**

● Admin > Site > Users > Check box beside user you are wanting to delete out on left hand side (that line/row will highlight in the color of blue) go to the top right corner and hit delete.