FleetComplete®

Module 6

Route Management

Fleet Complete Training – April 2015

Learning Objectives

- Understand the concept of **Routing**
- Learn about route **Classifications**, **Templates** & **Instances**
- Understand the **Workflow** of Route Templates & the Workflow **Participants**
- Learn how to use the different **Search** Engine Options
- Understand the **3 Types** of Route Templates and learn their **set up requirements**
- See and example of a **Route Sheet** & a **Driver Manifest** and learn how to generate them.

Important Terminology

The following tables provides a list of relevant terms that will be referred to in this module and their definitions.

Term	Definition
Routed	Refers to planed trips with multiple stops for one or more clients. The orders are often scheduled ahead of time before the day the work is to be done. Routes can be recurring in nature or be flexible and planned based on incoming work.
ETA	Refers to **Estimated Time of Arrival** at either the pick up or delivery stop.
Resources	Refers to the Employees or Drivers performing the work on the orders
ASN	An **advance ship notice** or **advance shipping notice** (**ASN**) is a notification of pending deliveries, similar to a packing list. It is usually sent in an electronic format and is a common EDI (Electronic Data Interchange) document.

Prerequisites

The following components need to be pre-populated in Fleet Complete prior to creating routes.

Component	Path from the Dispatch Configuration Screen
Clients	Clients
Dispatch Zones*	Orders and Routes → Dispatch Zones
Resources	Resources
Resource Certifications*	Resources → Resource Certifications
Equipment Types*	Resources → Equipment Types

* If applicable

FleetComplete®

Note: Dispatch Zones are only pre-requisites of distribution routes to be explained further in the module.

Concept of Routing

The **Routing** function allows you to **plan trips** in advance with multiple stops for one or more clients.

You will have the ability to decide in advance or on the day of how you will use your **resources** and **vehicles** to perform the work.

Routes can be **recurring** in nature or be flexible and **planned based on incoming work**.

Route instances can be **automatically created** and either **dispatched directly** to the resource **or added to the dispatch monitor** on the days it runs.

Lesson 1

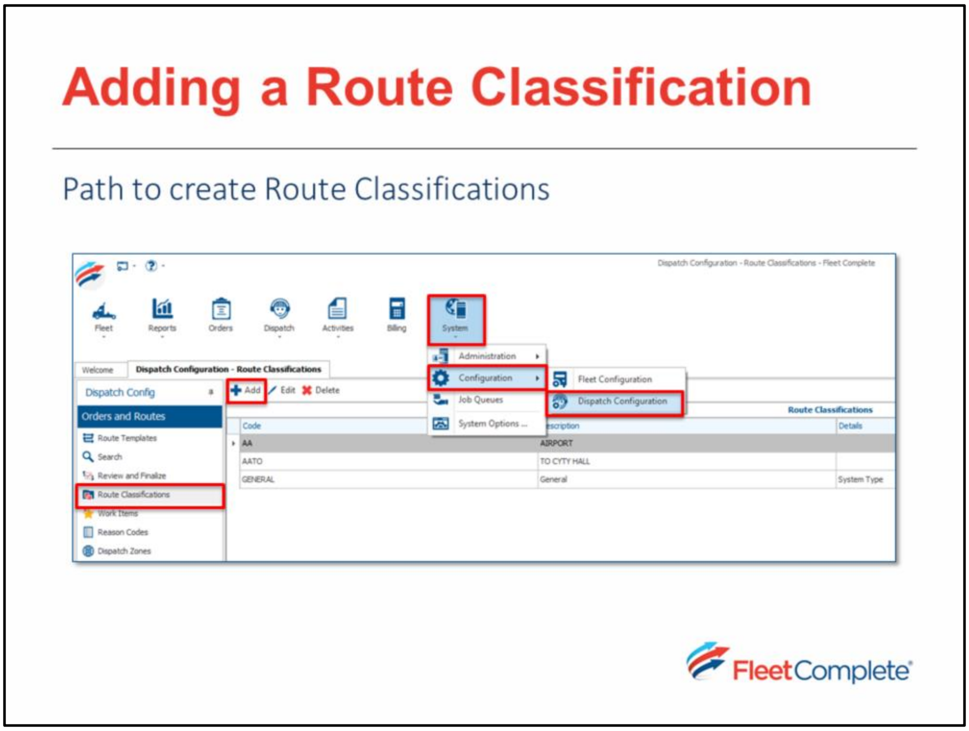
Route Classifications

Purpose

The **Route Classifications** can be created to **differentiate routes** of different kinds from one another **for reporting and billing** purposes and can be a **factor in determining price** in Routed Rate Charts.

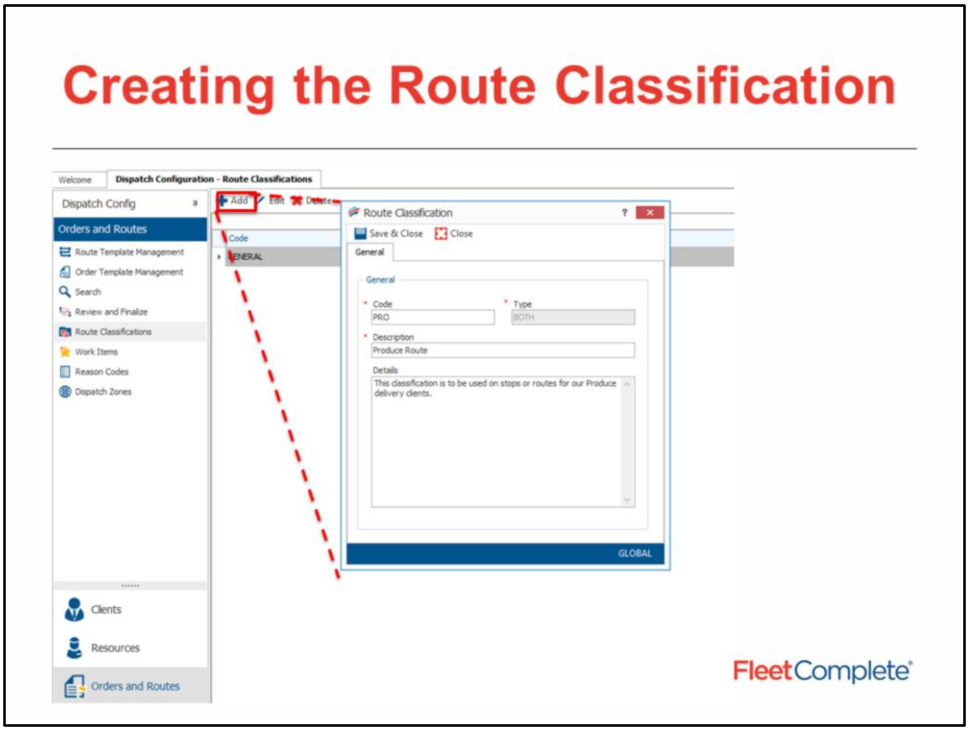
A Route Classification can be created to **refer to a route**, a **stop** on a route **or both**.

FleetComplete®



To create a route classification

Click on the **System Icon**
Click on Configuration
Click on Dispatch Configuration
Click on Orders & Routes from the left hand side panel
Click on Route Classifications
Click on the ADD button



Here are the steps to add a Route Classification:

- Click **Add** and choose whether the classification should apply to a **stop**, **route**, or to **both**.
- Enter in a unique **Code**
- Enter in a **Description**, and
- Optionally add **Details** for this classification. This can be used to explain under which circumstances this classification should be used.
- Click **Save & Close**

Lesson 2

Route Templates

Purpose

In order to perform any routed work for one or several clients a **Route Template** must be created to manage the work.

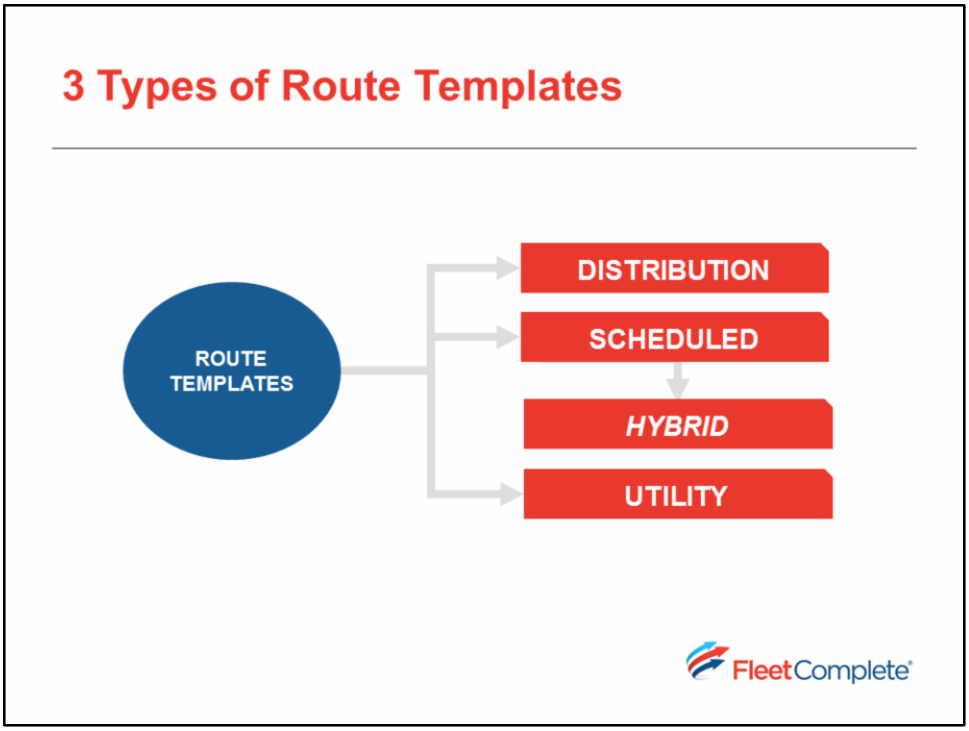
Route Templates allow you to define the details of routes in advance of their execution.

Route Instances can be created from the templates manually or by the system at a pre-defined frequency and are then available to be dispatched to a resource to carry out the route for that day.

FleetComplete®

Route Instances

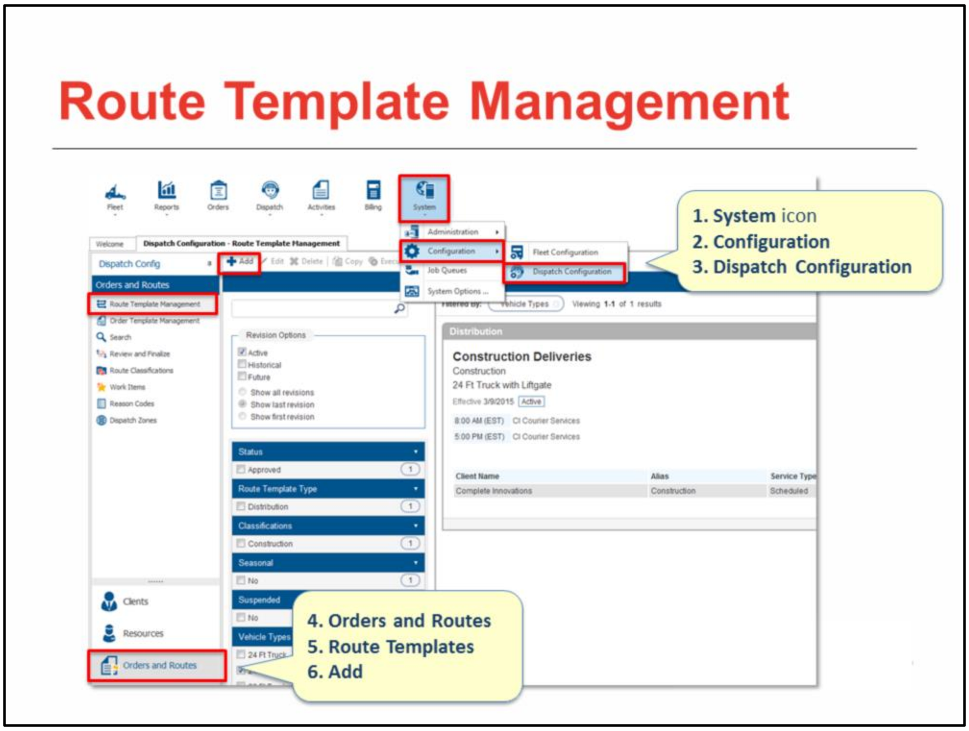
- Created on the days **defined** in the Route Template and are either added to the dispatch monitor or are dispatch to the Resource selected on the template for that day of the route.
- Scheduled route instances can be **modified slightly** without affecting the Route Template. Currently stops can be deleted from an instance but new stops can not be added.
- Route **instances** & client stops are **not created if** the account profile indicates that **it is a Holiday for that branch or client**.
- If adding multiple clients to one template, ensure the route **operates** on the same days for **ALL** clients.
- If a route instance fails to generate, the Branch Manager is notified via e-mail



There are 3 true Template Types

1. Distribution
2. Scheduled
3. Utility

Hybrid routes occur when a scheduled route template enables the addition of distribution orders in addition to the regularly scheduled orders. *(This will be further explain in the section on scheduled routes)*



To access the Route Templates:

From the Main Toolbar select the **System** Icon
Select **Configuration**
Select **Dispatch Configuration**
Highlight **Orders & Routes**, which are located on the left hand side panel
Select **Route Template Management**

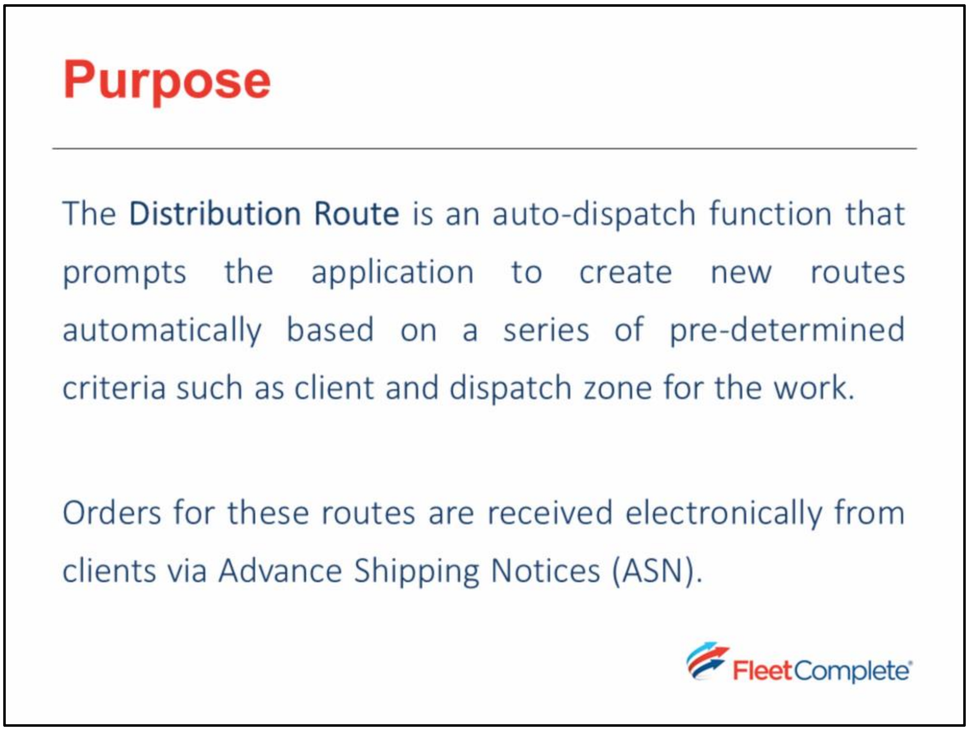
To add new Route Templates:

Select the **Add** Button
Select from **Distribution**, **Scheduled** or **Utility**

Lesson 3

Distribution Route

FleetComplete®



Important Note: In order to utilize this function it often requires a consultation with Fleet Complete's Professional Services department.

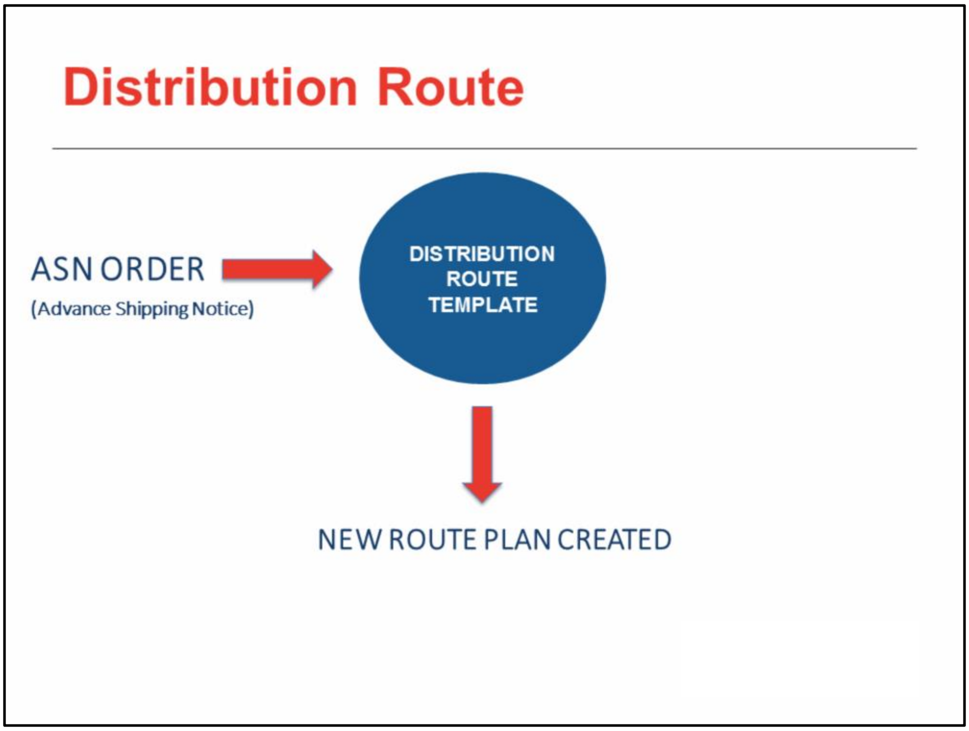
I discussion needs to occur regarding the file requirements and how the information will be received into the application.

As the information is often rather technical in nature it is recommended to have someone with background in IT or

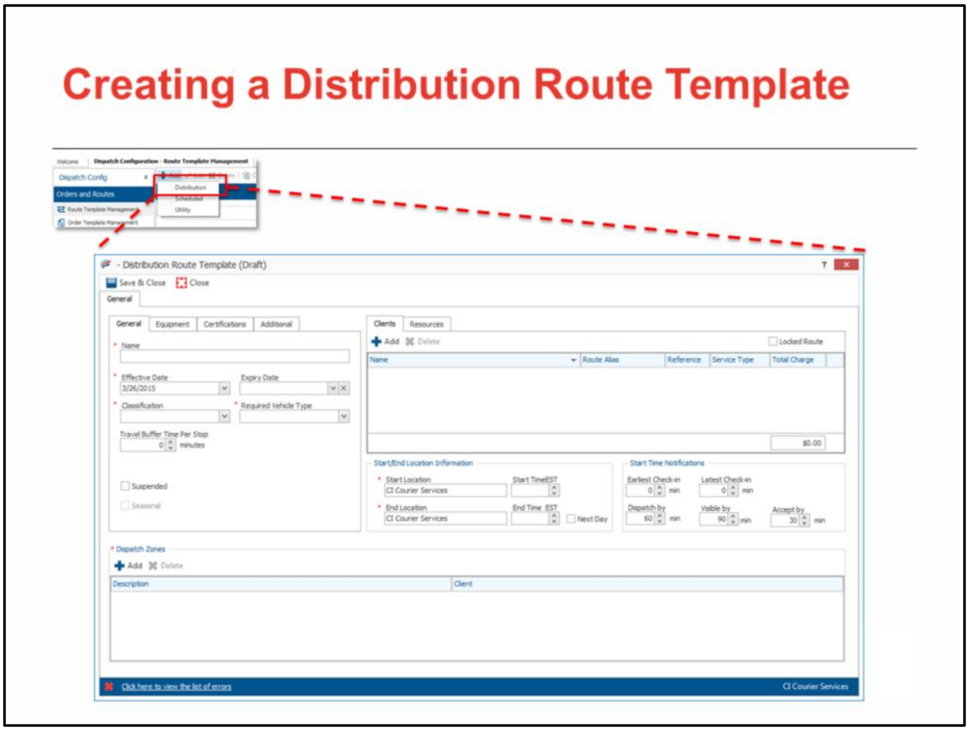
Software Development lead that discussion.

* If the Fleet Complete's Professional Services department is requested to perform any development or other services

on your behalf additional costs may apply and would be quoted by Professional Services directly.



A **Distribution Template** is created as a way to filter through the incoming orders. Orders come in electronically via an ASN (**Advance Shipping Notice**)
The application looks at the order criteria such as client, dispatch zone and delivery date and times and uses the **Distribution Route Template** to sort incoming orders into routes plans.
The **Distribution Route Planner** (which we will be reviewing in Module 9 - Dispatching) is then used by the Dispatcher to validate and balance the work or to create on-the-fly route plans, which are **executed to produce Route Instances**.



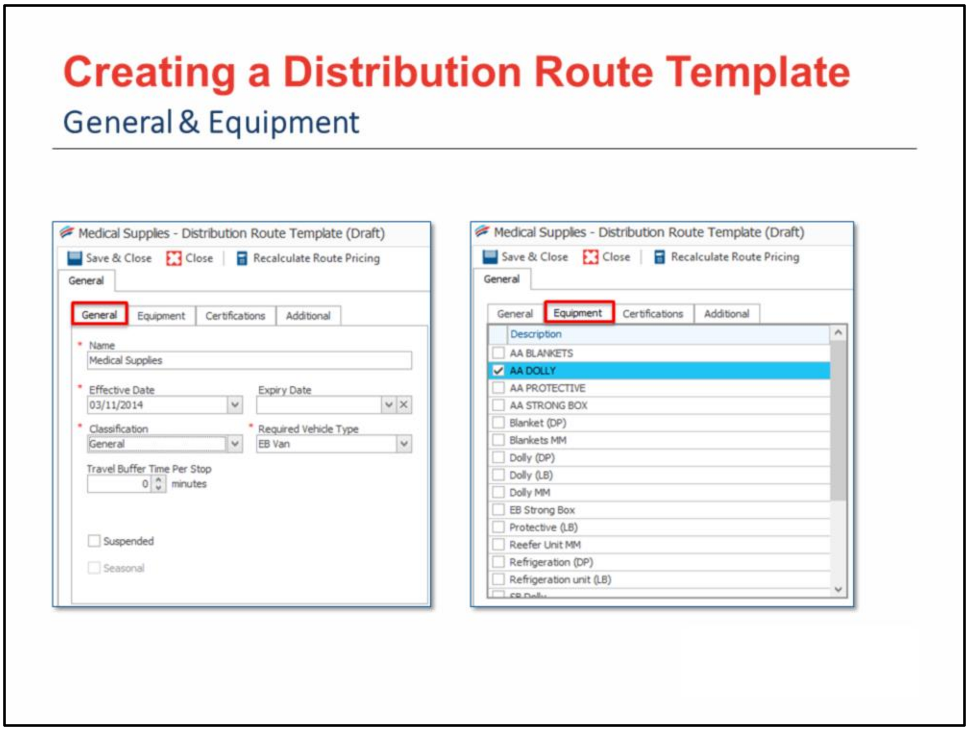
After selecting the **ADD** button located and Selecting Distribution in the toolbar in Route Template Management a new **Distribution Route Template** is opened in **Draft**

The **GENERAL section has multiple tabs**

On the left **General**, **Equipment**, **Certifications**, **Additional** tabs have been grouped together.
On the right **Clients** and **Resources** tabs have been grouped.

Below Clients and Resources are the Route **Start & End Information** and **Notification** sections

The bottom of the Distribution Template screen is dedicated to the **Dispatch Zones** that will be used to filter and sort the work.



On the **General Tab**, enter general information about the route template which includes:

- Enter a descriptive **Name** for the template
- Enter the **Date** on which the template is **effective**, and optionally **expires**.

All Route templates must have an **effective date**, representing the earliest date on which they could take effect.
Optionally, they can have an **expiry date**, the date on which the template stops being in effect.

The effective date alone does not determine whether a template is in effect: even once the effective date is reached, if the template has not reached the appropriate stage in its '**approval**' workflow, it will not take effect.
For distribution route templates, "taking effect" means the earliest date on which route plans can be created. (For other templates it would mean the earliest date on which instances could be automatically produced.)

- Choose a **Route Classification** from the drop-down menu. General is the default and any other classification would need to be created ahead of time,
- Select the **Vehicle Type** required for the work the template defines, from the drop-down menu
- Enter in the **Travel Buffer** time per stop, which is the amount of time to be allowed

per stop on the route for the driver to perform the task that is needed at that stop.
For example: The route is used by drivers who drop off medical supplies at each stop, a task that takes approximately 15 minutes.

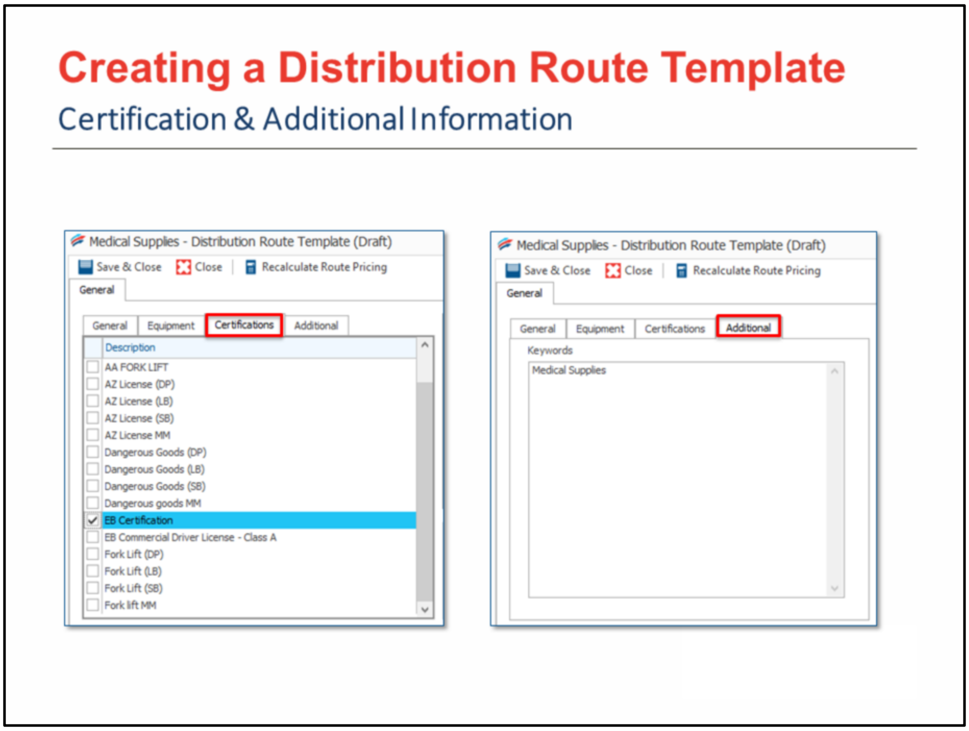
- You have the option to mark a route template as **Suspended** temporarily.

For example: If your customer is closed over the Christmas Holidays, you can mark the route as Suspended, which will stop the route instance from being generated

- If you preform work for your customer on a seasonal bases, you can mark the route template as **Seasonal** and enter in an **Expire Date**, the route template will automatically become active exactly 1 year from the Expiry Date.

For example: Basket Deliveries every Christmas for your client to ALL of their customers

2. On the **Equipment Tab**, select the equipment that is required for this route template

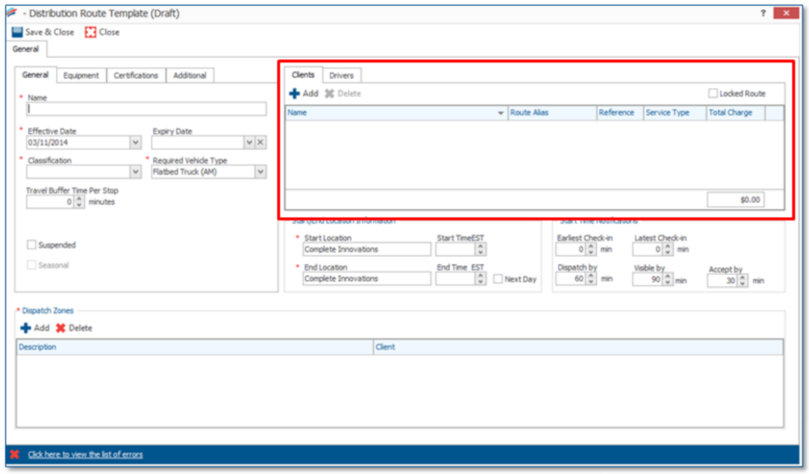


On the **Certifications Tab**, select the resource certifications that are required for this route template. Certifications had be created prior to this step in a route template creation.

The **Additional Tab**, allows you to enter in keywords that will make it easier to search for this template

Creating a Distribution Route Template

About Clients

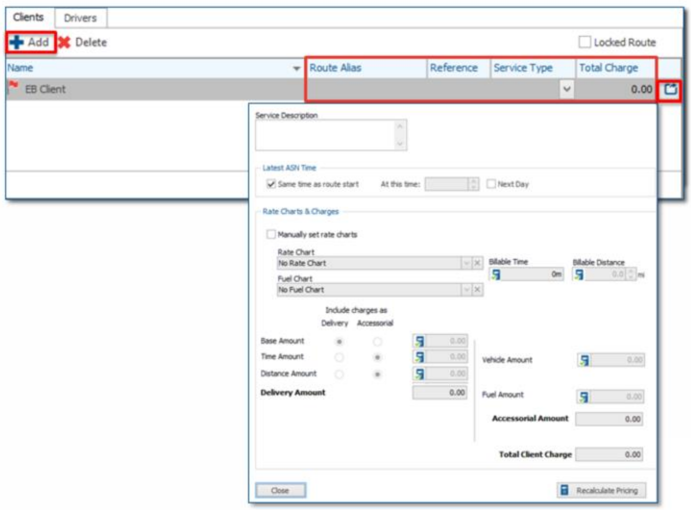


One or more **Clients** can be added to the Route Template.

A route template can be **locked** to block the addition of other clients to the template by placing a check mark in the box next to **Locked Route**

Creating a Distribution Route Template

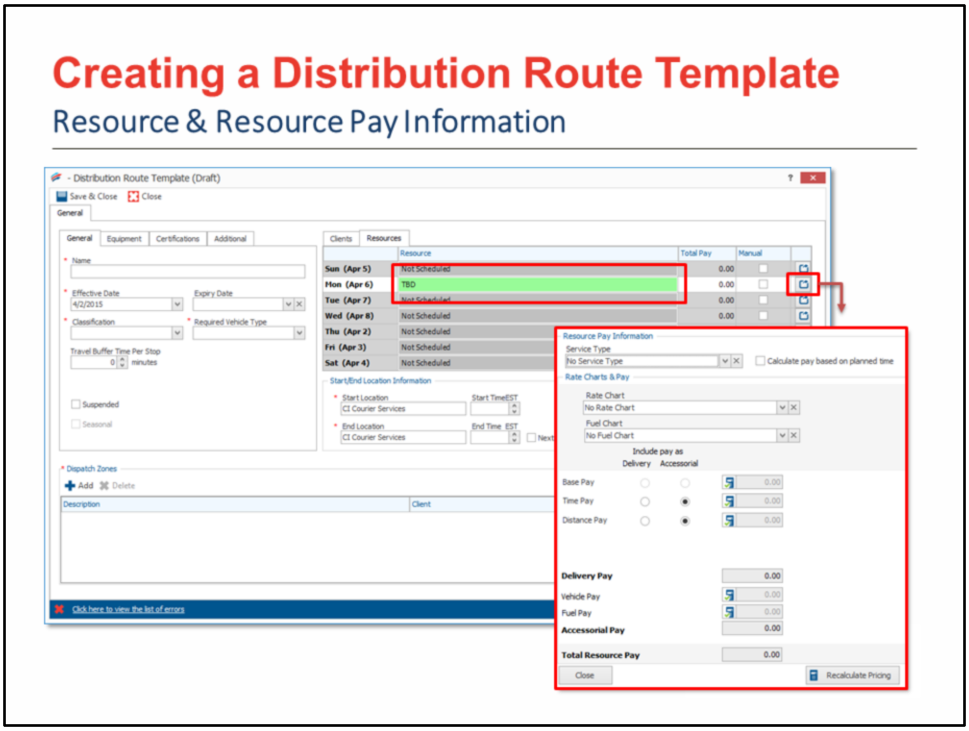
Adding Clients



To add a client to the route template:

Select the **Add** Button
Enter in the **Clients Name** in the search field, and select the client from the drop-down list
Optionally enter a **Route Alias** for searching and/or a **Reference** number if desired,
Select the **Service Type**. This is a mandatory field and will also drive the pricing for orders on this route.
Click on the **Additional Information** symbol to the far right of the client field to view and manually adjust client charges as required, then click Close.

Charges will not appear in the template as they will depend on how many orders end up on the route each time and instance of the route is created.



Steps to add a Resource to the Route Template:

On the **Resources Tab**, you can add Resources to the route template, OR if you do not know who will be assigned to this route, you can enter in TBD (i.e. To Be Determined).

This is where you will **identify the days on which instances will be created**. Days marked as **Not Scheduled indicates that route wont run on that day** of the week.

Once a resource has been selected you can **click the arrow** on the right hand column next to the corresponding resource to **view or edit Resource Pay Information.**

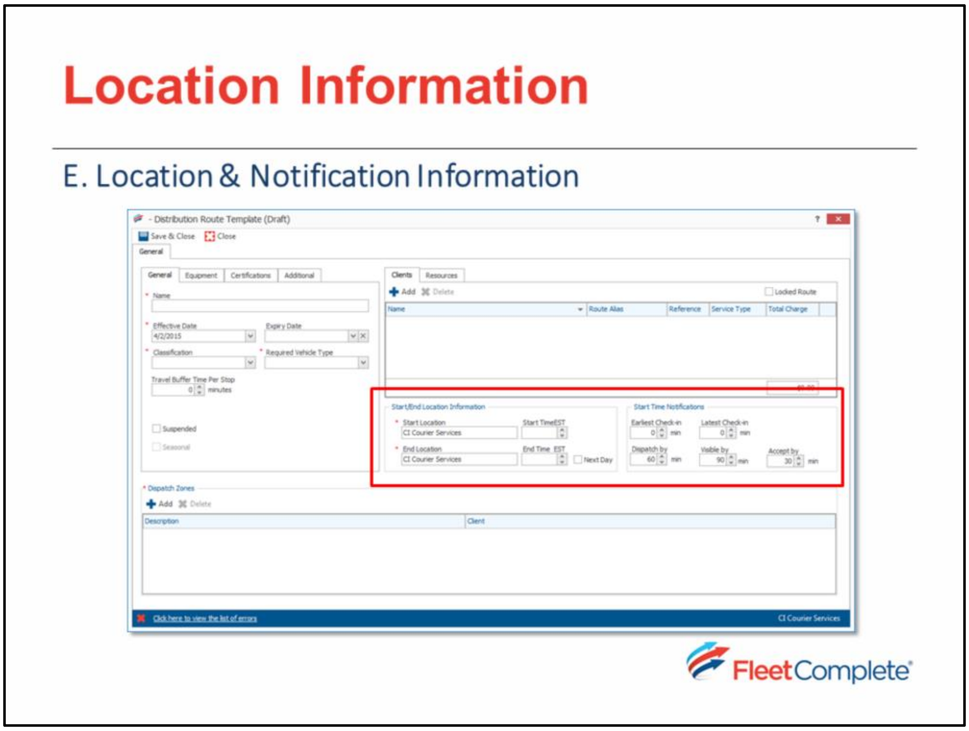
The resource will be **paid by default based on the service type being selected for the client** in the template. This **can be manually overridden** by changing the service type in the dropdown menu.

By placing a checkmark in the **Calculate pay based on planned time** field the **resource will be paid for the time planned** in the template for start to end of the route and **not the actual start to end time on the day the route is run.**

The **rates charts that** will be used to pay the driver **can also be manually changed**.

Pay can also be edited by **clicking on the calculator** and manually **updating the**

values in these fields.



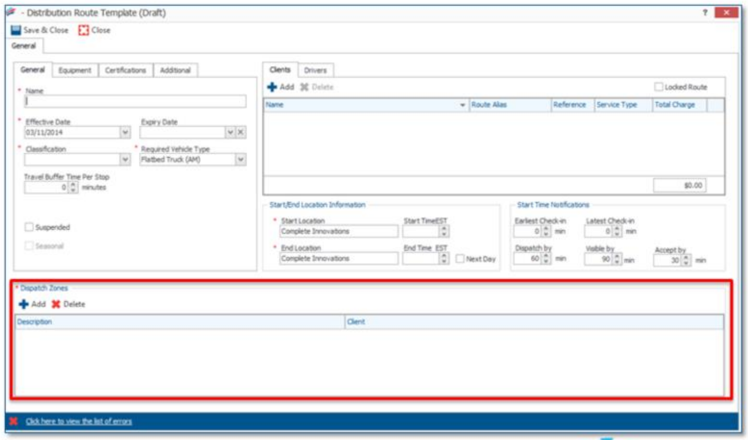
The last step is to enter in the **Location** and **Notification** Information, which includes:

Enter **Start & End Location and times**. The system defaults to the location of your branch. Make the appropriate changes as required.
If the route involves work that takes place overnight, select the **Next Day** option

Optionally, complete the **Start Time Notifications**, which include the check-in, dispatch, and acceptance time options

Adding Dispatch Zones

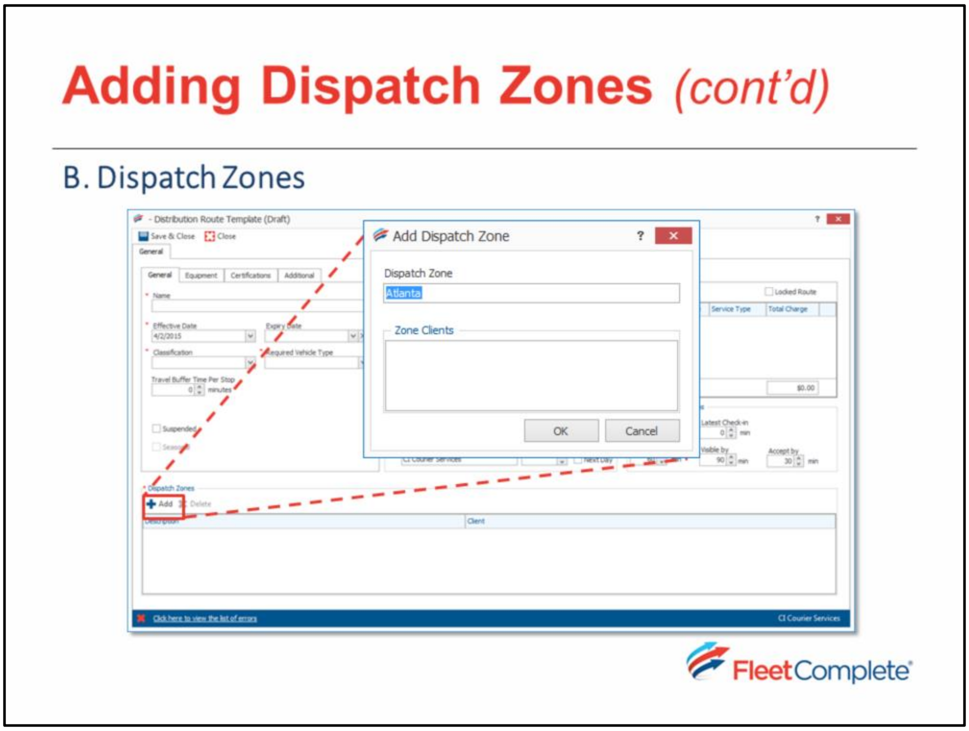
B. Dispatch Zones



FleetComplete®

You then need to assign the **Dispatch Zones** to which the route template applies, and for each, which of the clients in the route template uses that zone.

Incoming work for that client and dispatch zone will be associated with this route template, or any other route template that provides the same combination of zone and client.



Steps in adding a **Dispatch Zone** to a Route Template.

Click the **ADD** button to add a Dispatch Zone.
In the **Dispatch Zone** field, begin typing a zone, the system will find the Dispatch zone that matches the value you typed in.
Click **OK** to save this dispatch zone assignment.
Repeat for any additional dispatch zones you need to assign to this Distribution route.

Once all the information has been entered. Click the **Save & Close** button to add this Route Template

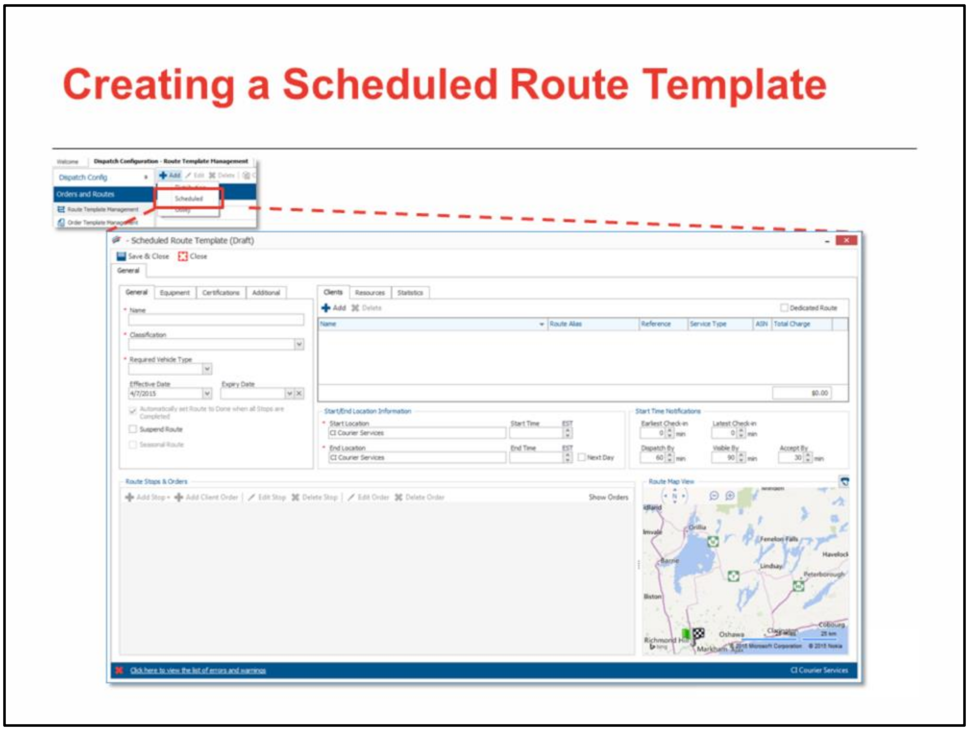
NOTE: The message you see after saving and closing this route template depends on where the template is in its 'approval' workflow. Once the template is approved and executed, you will use the **Distribution Route Planner** which we will cover in more detail in Module 9. The **Distribution Route Planner** allows a dispatcher to monitor and manage the assignment of orders received via ASN feed.

Lesson 4

Scheduled & Hybrid Routes

Purpose

The **Scheduled Route Template** function is used when the same stops and orders are repeated regularly based on a pre-determined schedule.

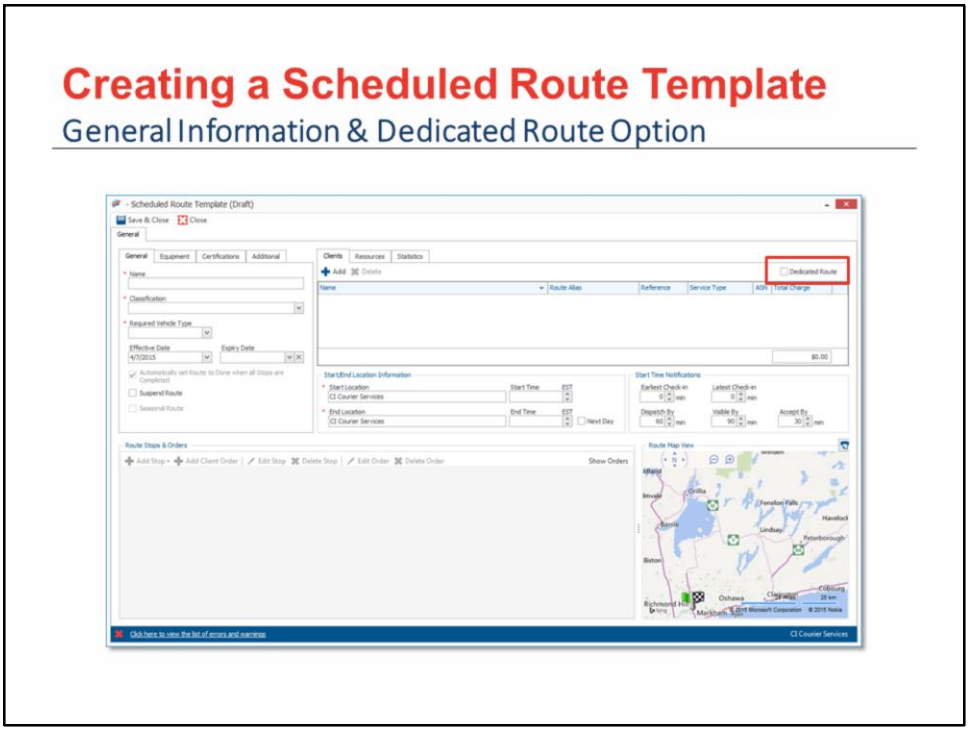


Creating a **Scheduled Route Template** is actually quite similar to that of a Distribution Route template.

To create a Scheduled Route template, when in the **Route Template Management** section of the Dispatch Configuration Panel, click the **ADD** button located on the toolbar.

Select Scheduled from the available template types.

If you are using branches, choose the branch to which this template will belong to, and click Continue.

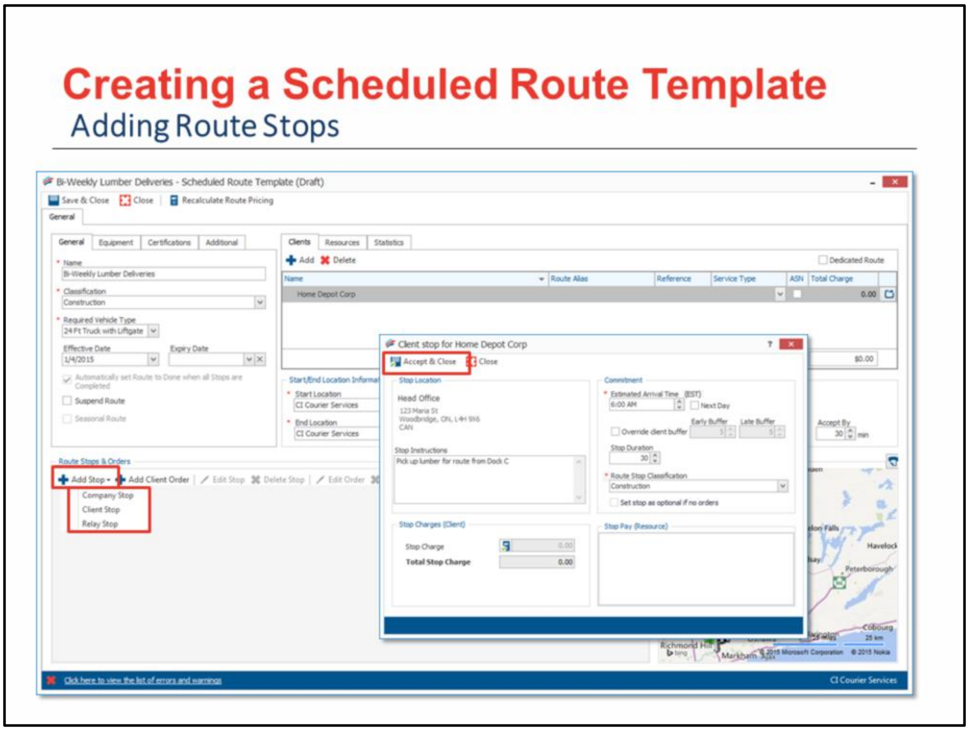


Steps to creating a Scheduled Route Template:

As described in the section on Distribution Route Templates, begin with completing the **General**, **Equipment**, **Certifications** and **Additional** Tabs.
Add Clients & **Resources**, to this scheduled route template, as required.

By selecting **Dedicated Route**, this prevents additional clients or orders from being added to the route (if the ASN field is selected) this means that work for another client that comes in via the ASN feed that matches the criteria for this route will not be able to be assigned to this template's instances. We will discuss the ASN feature next in the section on Hybrid Routes.
As was the case with Distribution Route Templates, the **Resources tab is where you will define on which days the route is run** and **who should execute the route**.

Fill in the **Start/End Location Information** & **Start Time Notifications**.



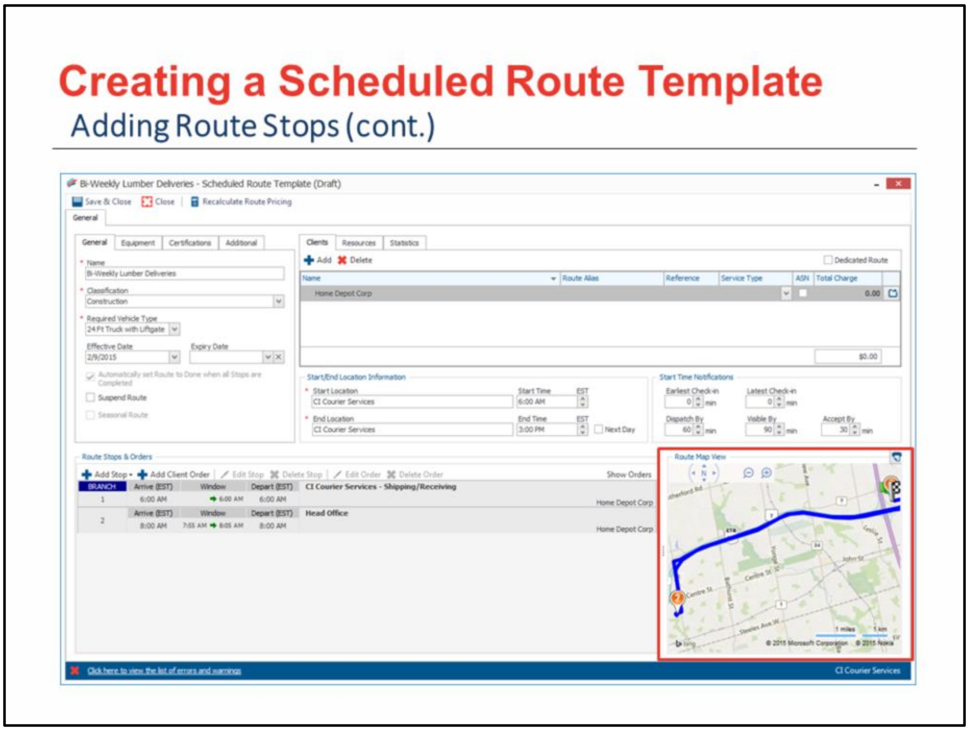
From the route Stops & Orders section below, click the **Add** Stop button. Three options will be made available.

Company Stop – This option is for **internal branches**
Client Stop – This option is for a **stop for a client** associated with this Route template, for which a stop is being performed
Relay Stop – Relays represent stops where **two routes intersect in order to transfer an order from one route to the other**

In the Stop dialogue box,

Enter the **Stop details** which include: stop **location**, stop **instructions**, **commitment** and stop **charges** for the client which default to any stop rates specified in the clients rate chart.
You can **over-ride the default by unlocking the stop charge and entering in a new value**.
If needed, to **update payment for the resource** that has been assigned to the route unlock the stop pay and enter in a value. This will not be available if the resource has not been selected.

Use the checkbox to **Set stop as optional if no orders**. If there are no orders at this location the stop is optional for the driver.

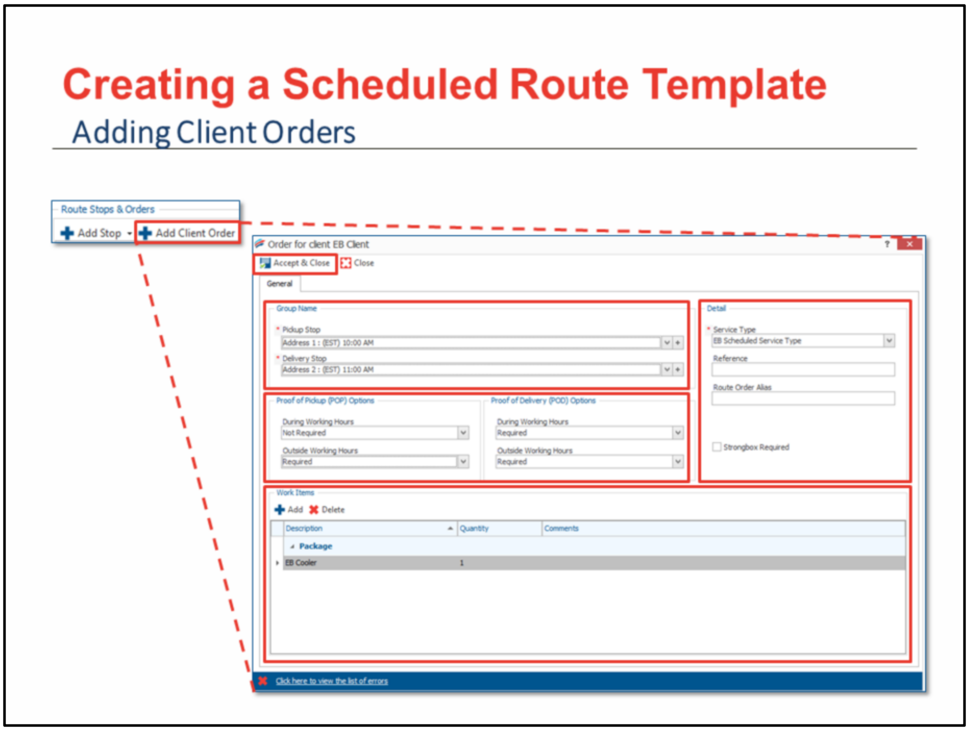


Here is an example of 2 stops added, along with the Route Map View on the right hand side, with the stops labeled **#1** and **#2.**

There is no functional difference between these different types of stops. The different types are just to identify stops by their purpose.

As you continue to add stops and, optionally, orders to a template, the Route Stops & Orders area of the screen becomes populated.
Stops are placed in chronological order and also added to the map: click on any point on the **Route Map View** to see its details.

IMPORTANT NOTE: Conflicts (e.g. identical arrival times) are not flagged.



Highlight the stop at which you would like to add an order.

Click the **Add Client Order** button and select the Client you want from the dropdown list.

Choose which of the stops on the route should be the **Pickup** (any one but the last stop) and **Delivery** (any one but the first stop): only stops for the selected client are shown.

Optionally, choose how **Proof Of Pickup & Proof Of Delivery** is to be handled **During and Outside Working Hours** on this order. This allows work to be completed even if no-one is present to sign for delivery.
It is important to note: that the default is set to the values in the Client account.

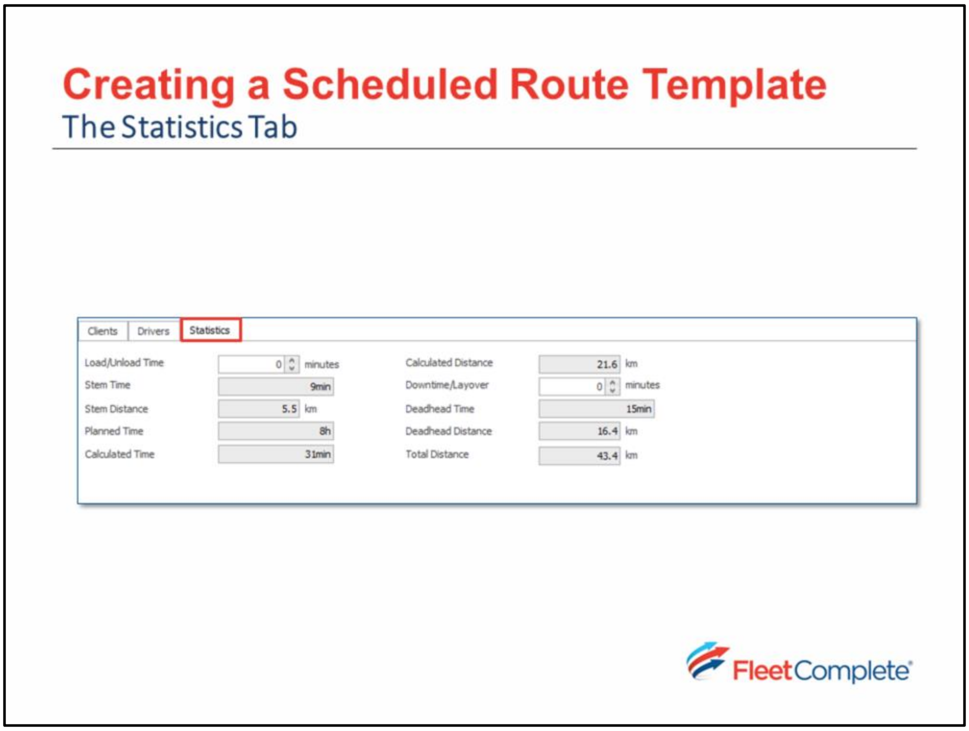
Select the **Service Type** to be performed as part of this order (the list reflects those service types associated with the client for whom the order is being performed).

Optionally, enter a **Reference** and **Route Order Alias**.

If the order requires the use of a Strongbox, place a checkmark next to **Strongbox Required**. (The driver will be prompted to use a strongbox.)

Optionally as well, you can add **Work Items** to the order, by clicking the **ADD** button in the Work Items section and select the relevant work item(s) and then entering their quantity (example: how many packages are expected to be transported) and add any necessary comments about each item.

Click **Accept & Close** to add this Client Order stop to the Scheduled Route.



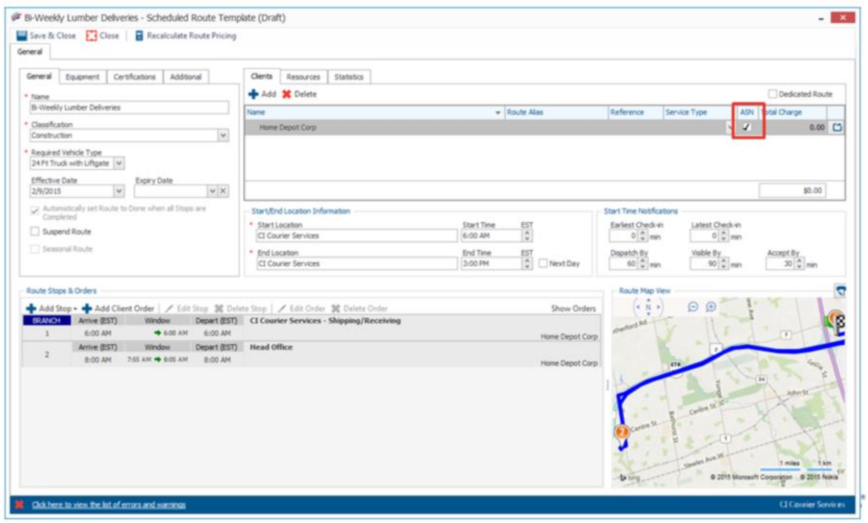
On the **Statistics** Tab, view information calculated (by Bing) for the route as currently defined.
This information is useful for planning and reporting purpose.
Some values (load/unload time and downtime/layover) can be manually added on this tab.

The Stops and Orders that were added, contribute to the information shown on the **Statistics** Tab.

Stem Time – Is the time that the driver need to go from his start location to the first stop.
Stem Distance – Is the distance that the driver needs to travel from his start location to the first stop.
Deadhead Time – Is the time that the driver needs to go between the last stop and returning to the yard or office.
Deadhead Distance – Is the distance that the driver needs to travel from the last stop and returning to the yard or office.

Once all information is entered in your Scheduled Route template, save it by clicking **Save & Close**

Creating a Hybrid Route Template

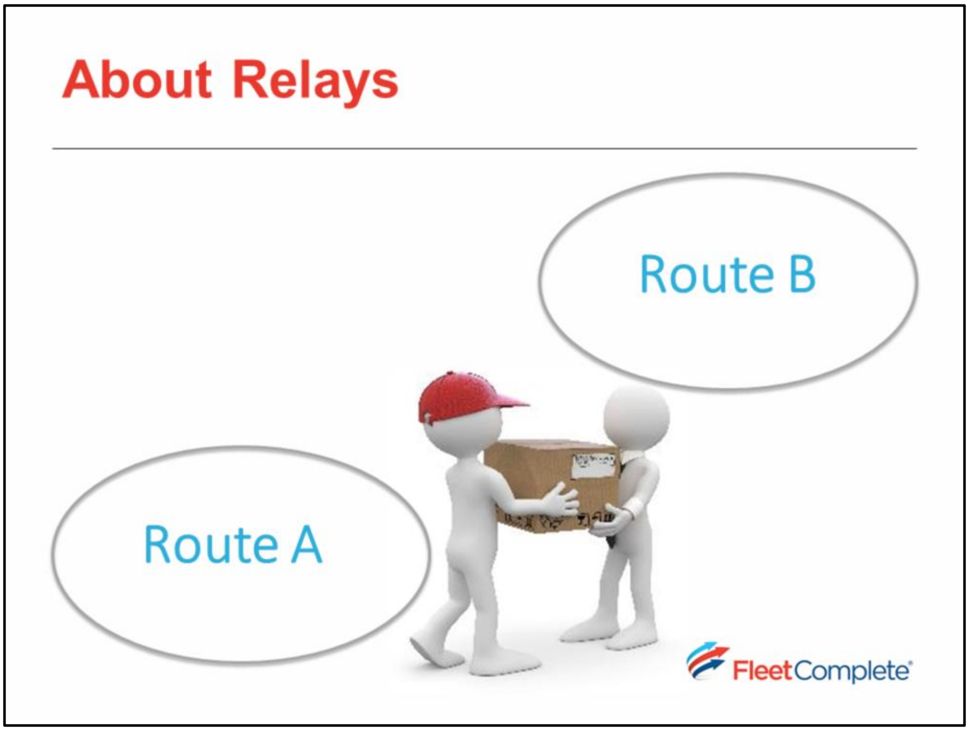


A **Hybrid Route** is a combination of a **Scheduled** and **Distribution** Route.

Essentially, it is a **Scheduled Route** with the **ASN flag for designated clients**.

Incoming ASN orders will align with route instances for the designated client, if those route instances have stops at the appropriate location on the Scheduled Route Template.

You can skip a stop if the orders do not include any pieces which would be added either via the ASN feed or manually.



Relays represent stops where two routes intersect in order to transfer an order from one route to the other.

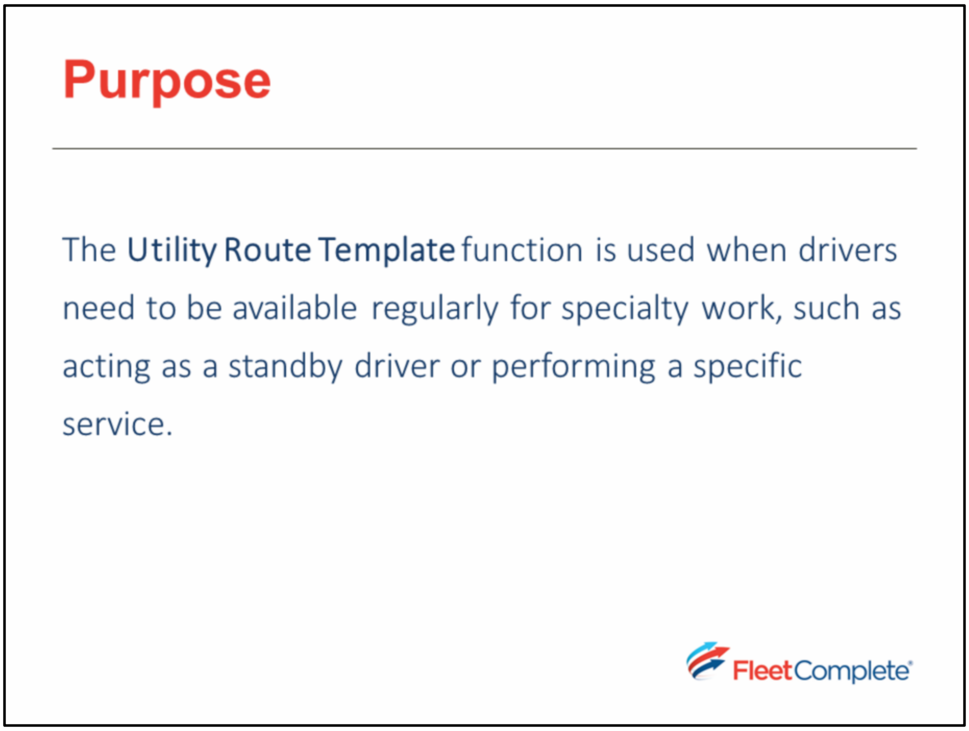
An example of a Relay may be a package that will be picked up on a route but the end destination is not along the pick up route for that resource. If a route involves local pick ups but there are some packages that need to be delivered much farther they can be transferred to another route at the relay point for the long haul portion of the delivery.

To establish a Relay within a Route Template the Relay Stop must be added and an order must be created with the relay information.

There are many components to setting up relays. If this is a business requirement you can schedule a separate session with a trainer via training@fleetcomplete.com for assistance.

Lesson 5

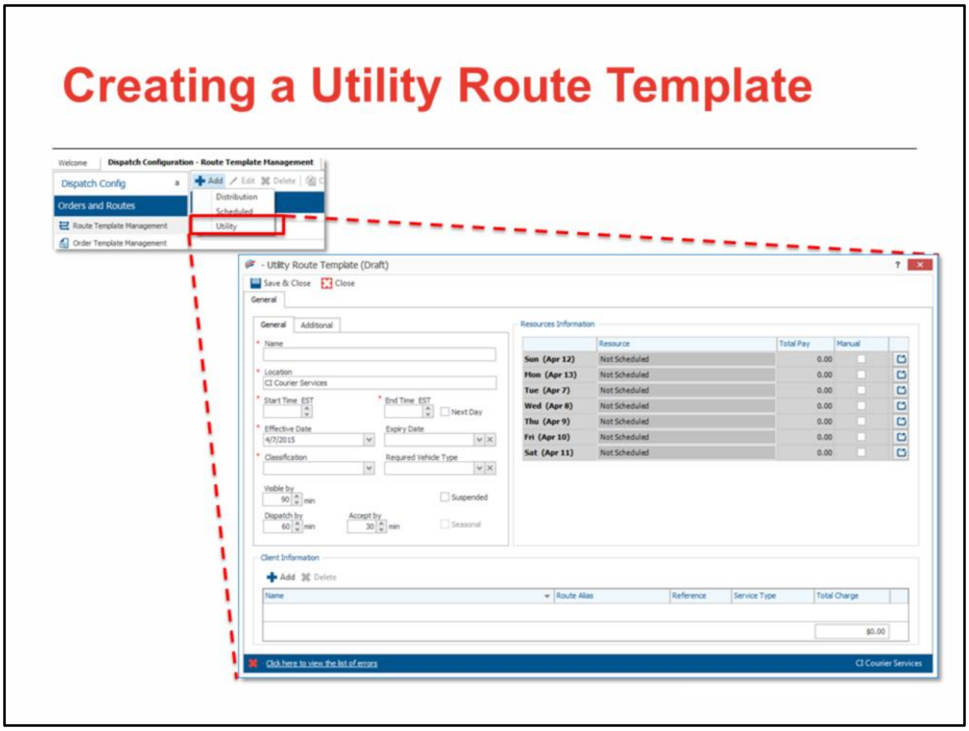
Utility Route



Essentially, you are **reserving the resources time.**

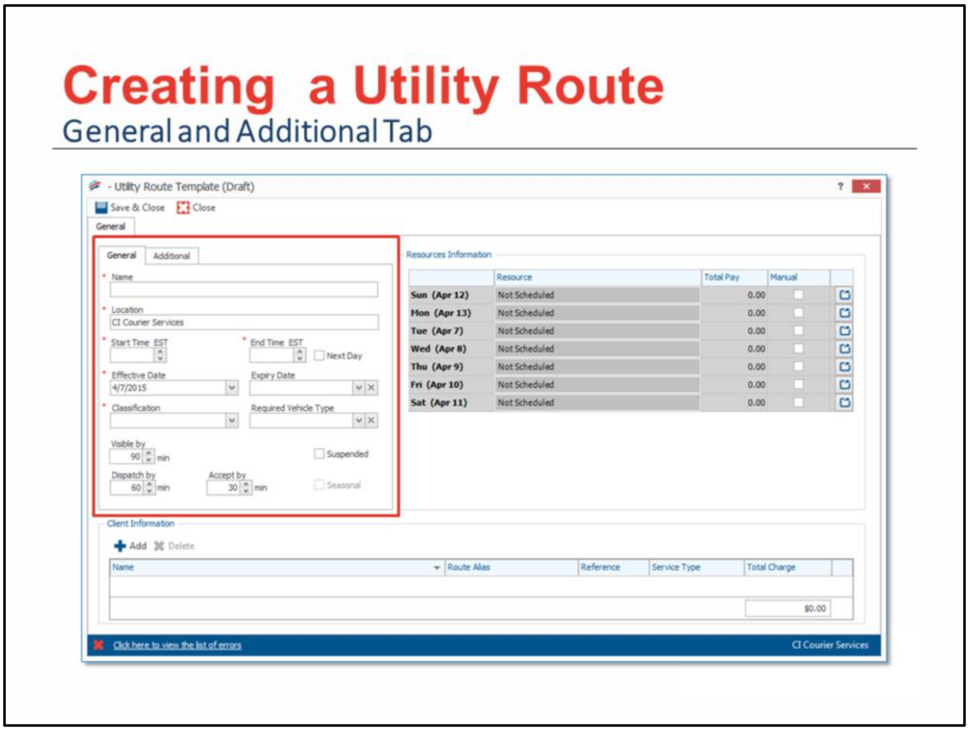
This template can be used as a **way to pay a Resource**.

Examples of use for utility routes could be: As a way to pay or reserve them for being on **standby** or if the resource is **loaned out to the client** and the client is being charged by the hour regardless of the orders they ask the resource to fulfil.



To create a Utility Route Template, click the **ADD** button When in the Route Templates Management Screen and select **Utility**

If you are using branches, choose the branch to which this template will belong to, and click Continue.



Steps to complete a Utility Route Template:

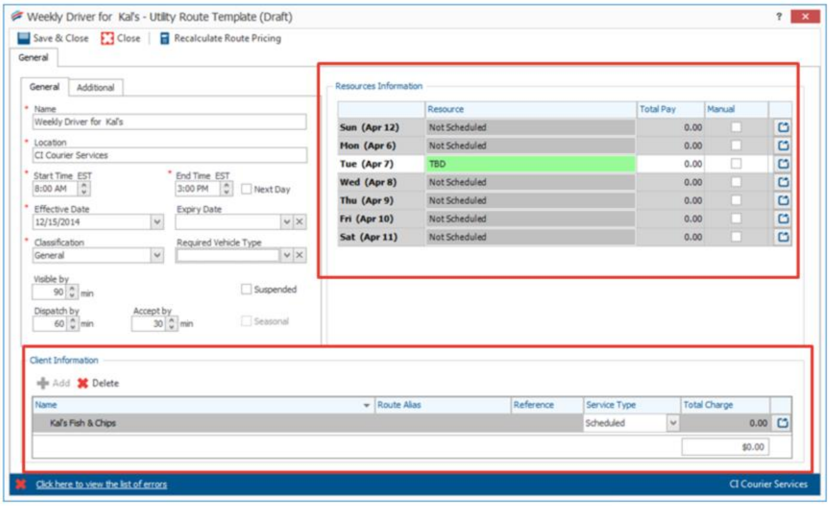
In the **General** section:

- Enter the **name** the route, select the location,
- Define: start/end time, effective/expiry date,
- Select the Classification and Required Vehicle Type,
- and enter in the parameters for Visible/dispatch and Accept by options

In the **Additional** Tab:

- Add a description and enter in keywords that will make it easier to search for this Utility template

Creating a Utility Route
Resource and Client Information

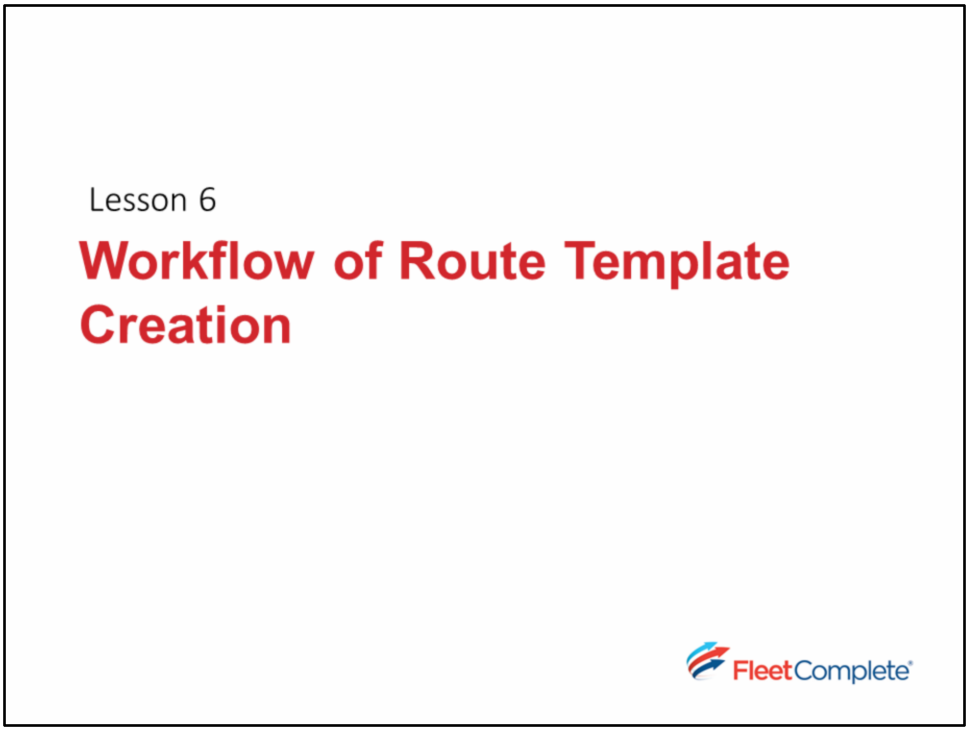


In the **Resource Information** section:
Setup the schedule by **adding a resource** to the days of the week the route will run
Select **TBD if** the route is to appear in the dispatch monitor or **the Resource is to be selected the day of the route.**
To **view or edit Resource pay select the option button** on the last column on the row with the resource name.

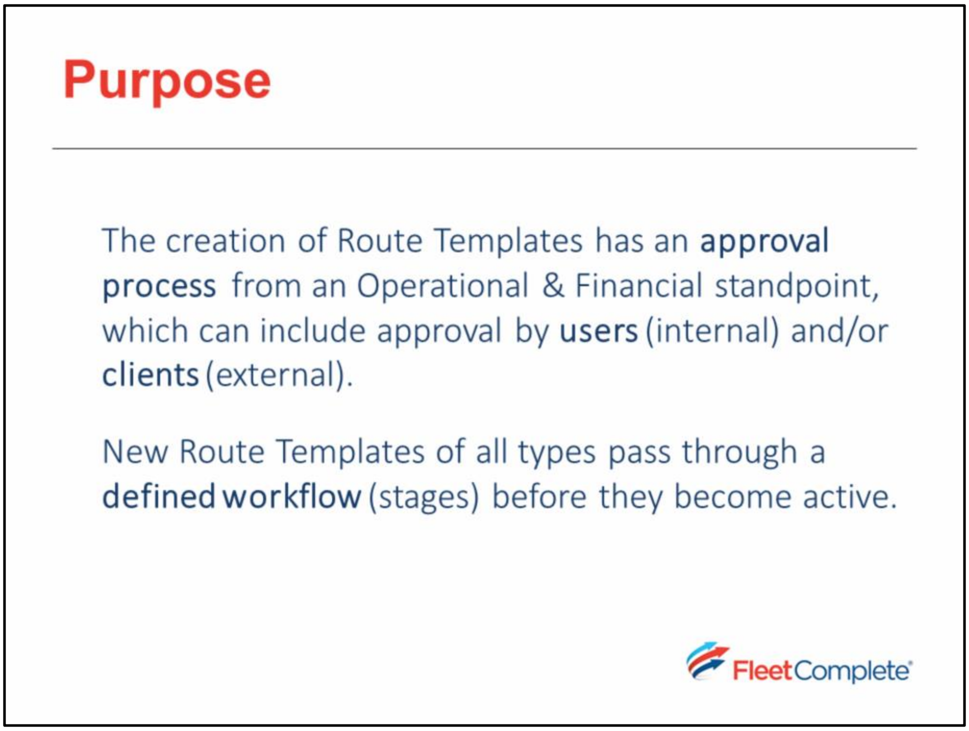
In the **Client Information** section:
Add the **Client** and **Service Type** that will be used to charge the client
Optionally add a **Route Alias**, **Reference**,
To **view or edit client pricing select the arrow** on the last column on the row with the client name.

Once all the information has been entered, click the **Save & Close** button.

In this example one resource (to be determined on the day of the route) would be sent to Kal’s fish & Chips to perform tasks for them from 8AM to 3PM



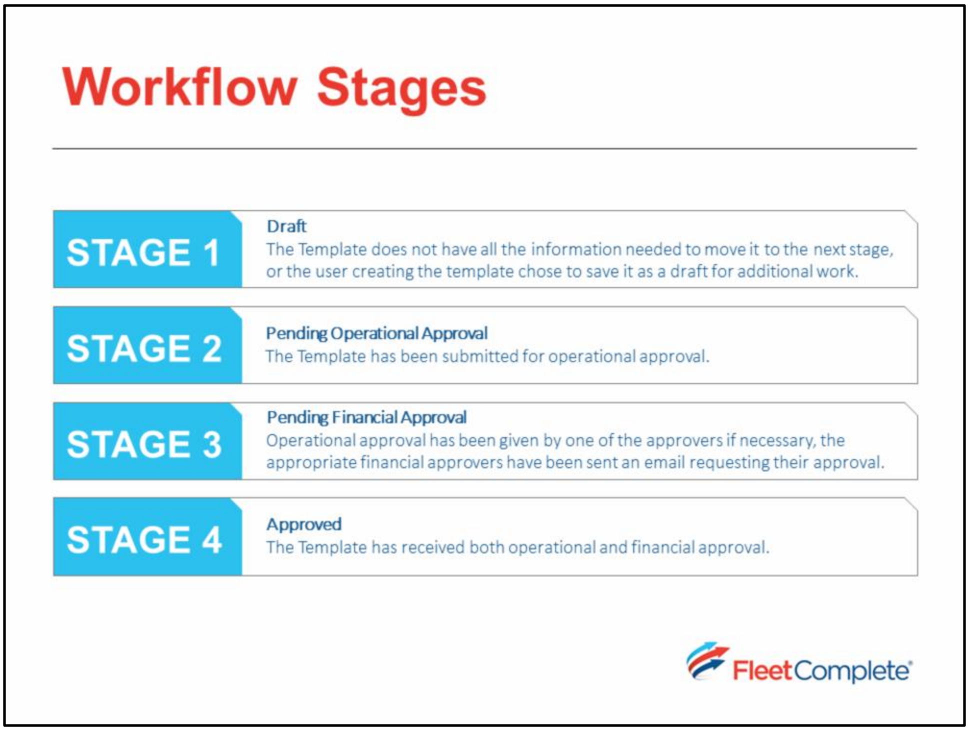
- Workflow Stages for the creation of Route Templates
- Workflow Participants
- Route Template Revisions
- Filter & Search Options
- And the 4 Groups associated with Route Templates



The creation of Route Templates has an approval process from both an Operational and Financial standpoint, which can include approval by users (internal) or clients (external). These users are referred to **as workflow participants**.

New Route Templates of all types must pass through a defined workflow (consisting of 4 main stages) before they become active.

Now lets take a closer look at the workflow stages.



There are 4 Stages to the Workflow of Route Templates:

Stage 1- Draft
When the template does not have all the information needed to move it to the next stage, or the user creating the template choose to save it as a draft for additional work.

Stage 2- **Pending Operational Approval**
When the template has been submitted for operational approval.

Stage 3- **Pending Financial Approval**
When operational approval has been given by one of the assigned approvers (if necessary), the appropriate financial approvers are then sent an email requesting their approval.

Important Note: Certain changes made to the template at this stage may require operational approval to be repeated, in which case the workflow returns to the *Pending Operational Approval* stage. This stage applies to utility route templates only if they involve clients.

We will be taking a closer look at utility route templates later on in this module.

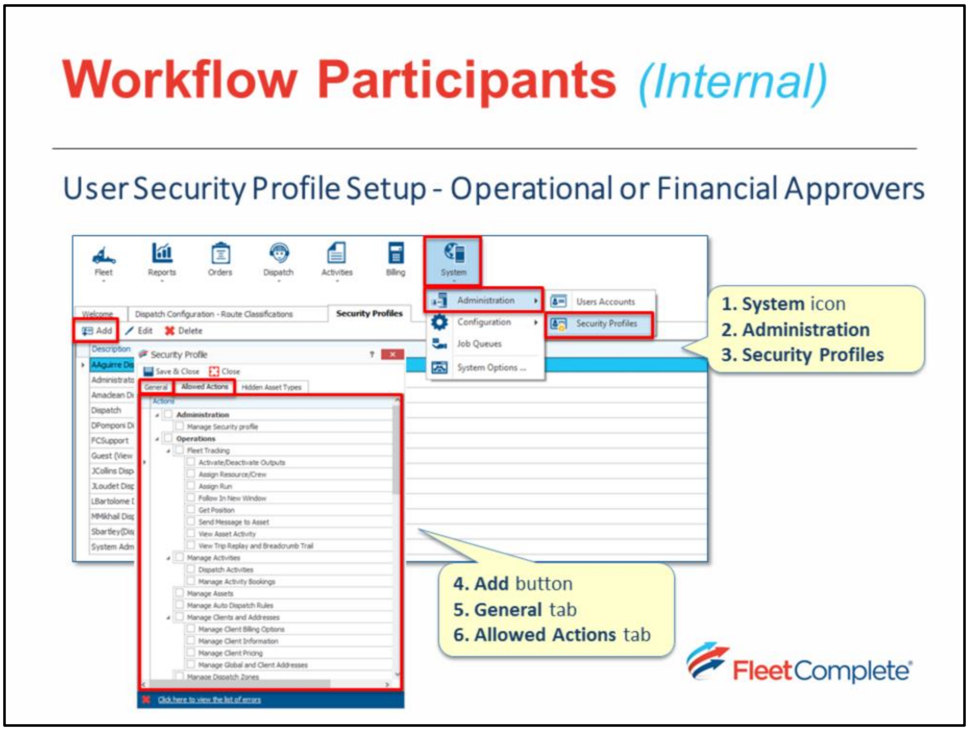
Stage 4- Approved
When the template has received both operational and financial approval

- Revised route templates may or may not require the full workflow to be repeated, depending on the nature of the change.
- If you make any changes, for example to the: time, vehicle, or stop (these revisions may also require approval if you choose, by clients)
- Some types of revisions require approval and, therefore, will change the template's status to "pending approval", some changes do not require approval and do not change the template's status.

Important Note: Templates can be copied if they are in this stage.

Moving Templates through Workflow
As you create or edit a template, it becomes eligible for moving to the next stage in the workflow. When you save a template, you will be prompted to enter a comment and provide whatever information is needed at that stage. (Example: an authorization number for operational approval, authorization numbers for clients, etc.)

Now lets take a closer look at the workflow participants.



Users are designated as operational or financial approvers through their **Security Profile**.
To setup Security Profiles:

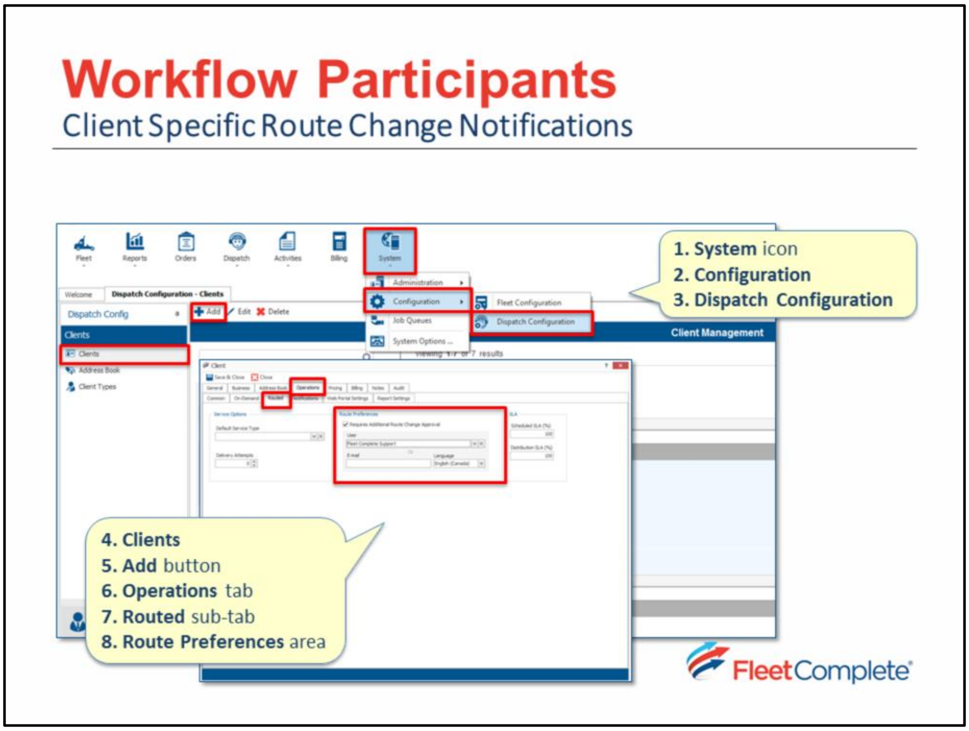
1. First we select the **System** Icon
2. Then **Administration**
3. And **Security Profiles**
4. Select **Add** Profile
5. On the **General** Tab, give the Profile a name
6. On the **Allowed Actions** Tab is where you will find the option to: **approve financial route changes** & **approve operational route changes**

All approvers receive an email message at the appropriate stage in the workflow: the message contains a link allowing them to log on to Fleet Complete and approve the template.
All approvers also receive an email message when the template has been approved, indicating its effective date.

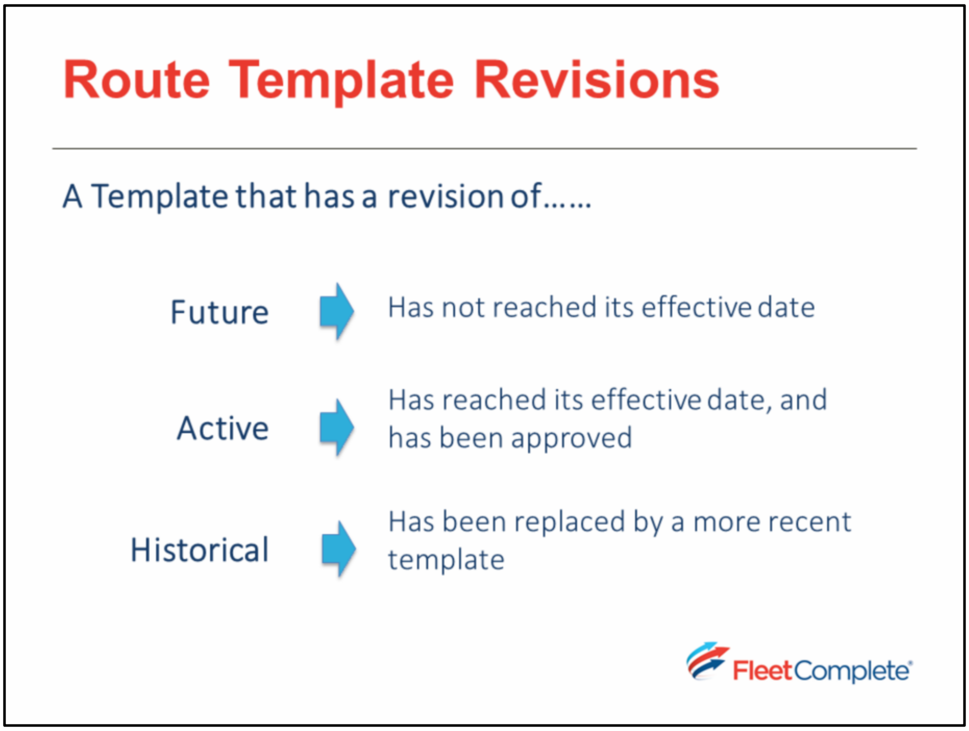
A user with the right level of approval could potentially push a route right to completion themselves by having both Financial & Operational approval rights.

In addition to approvers, designated users can receive notifications when route

changes occur: such users are identified (this is set up as part of the of the root or other branch configuration): these users receive emails whenever a template is pending approval (either operational or financial), has been approved, or has been suspended or unsuspended.



To enable route change notifications for a specific client:
1. First we select the **System** Icon
2. Then **Configuration**
3. And **Dispatch Configuration**
4. Highlight Clients, which are located on the left hand side panel
5. Open up the existing **client record**, or select **Add** to create a new record
6. Select the **Operations** Tab,
7. Then select the sub-tab **Routed**,
8. Finally, under the **Route Preferences** section is where you can designate someone within the company to be notified of the changes on routes for this client.



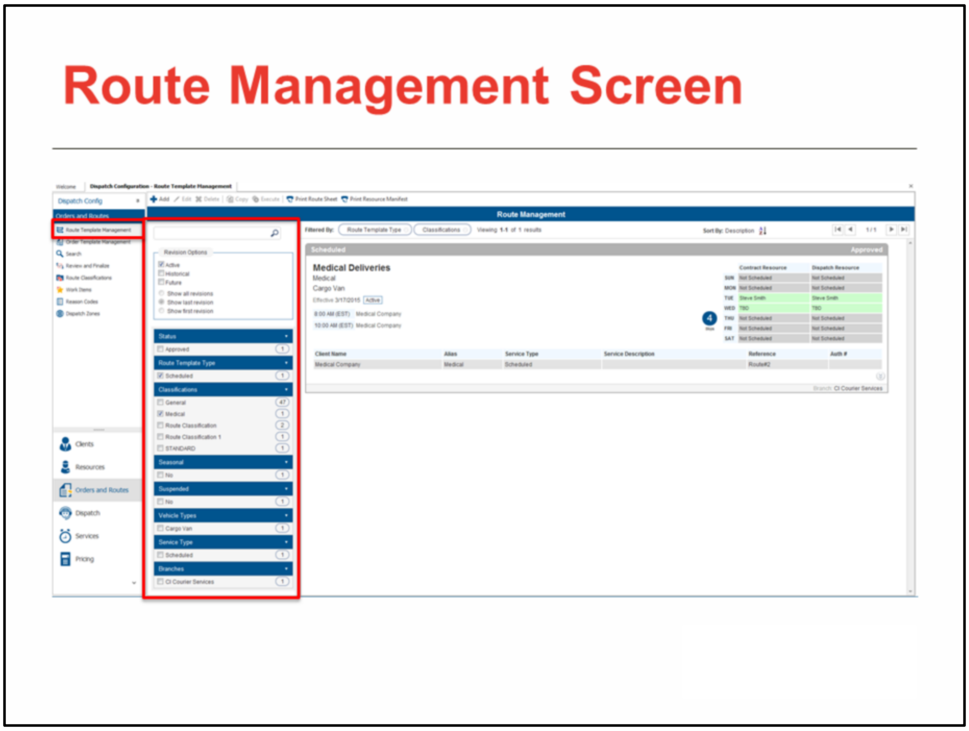
A Template that has a revision of:

1. Future
Has not yet reached its effective date

2. Active
Has reached its effective date and has been approved
An active template can be temporarily suspended or retired

3. Historical
has been replaced by a more recent template

Only one revision of a template can be active at any one time.



The Filter panel can be accessed from the **Route Template Management** Screen.

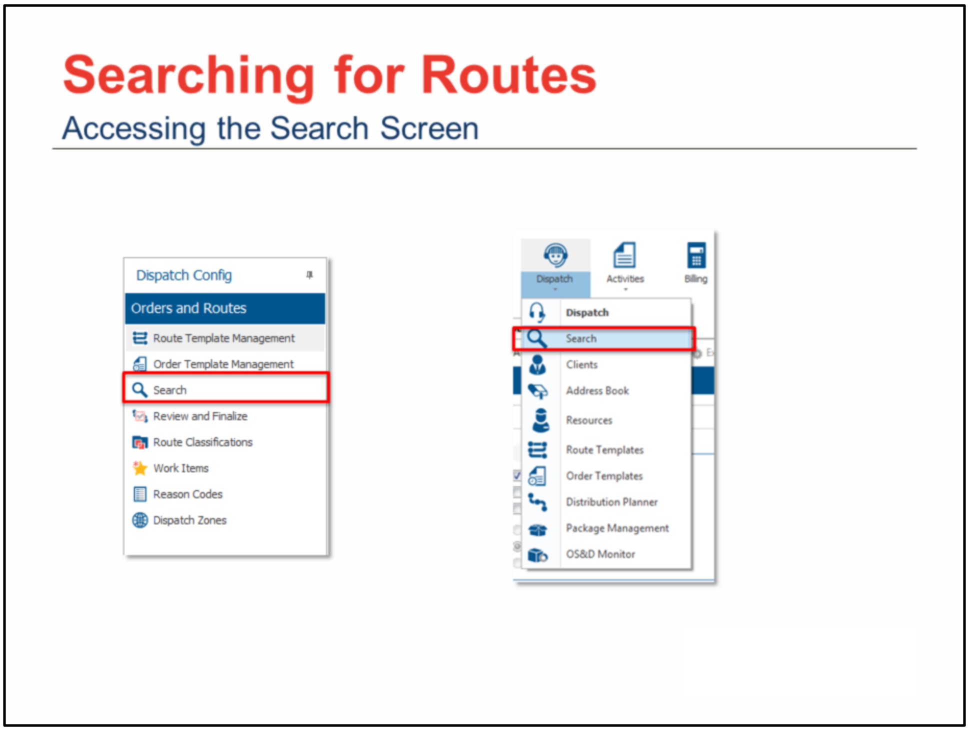
The Filter Panel allows you to view **Route Templates** by searching by keywords and/or filtering them.

The 1st set of filters are the Revision Options:
Select to view Active, Historical and/or Future

The search results will be grouped and displayed under the following categories.

Further Filtering can be done within these categories:

- Status
- Route Template Type
- Classifications
- Seasonal
- Suspended
- Vehicle Types
- And Service Type



The **Order and Routes Search Screen** can be accessed in 2 ways.

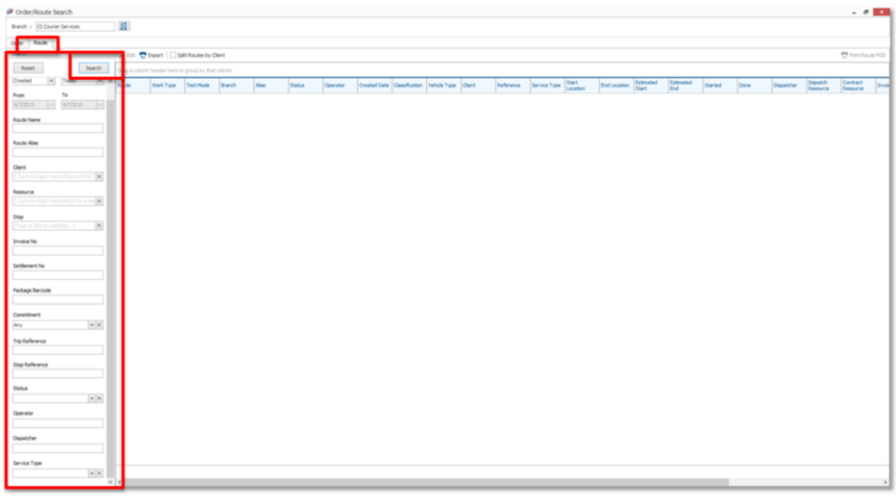
The 1st is by selecting **Search** from the panel in **Dispatch Configuration** under **Orders** and **Routes**.

The 2nd if by **clicking** on the **arrow** below the **dispatch icon** in the **top menu** items and selecting search.

In both cases **a new window will open** with all of the search parameters.

Searching for Routes

Accessing the Search Screen



Once the new order/Route Search screen opens click on the **Route Tab**

Enter search criteria in one or more of the fields

Click the **Search Button**

Any **routes matching the criteria will be populated** into the field to the right of the search criteria.

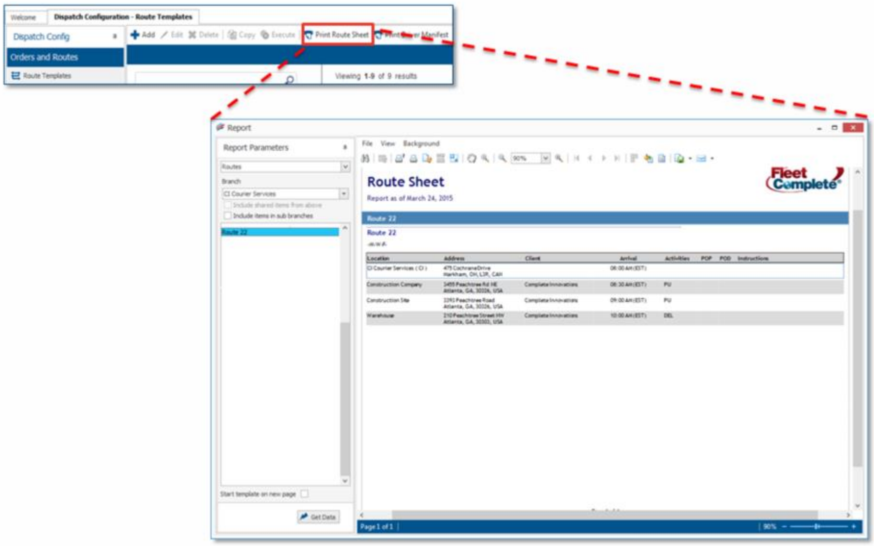
Click the **Export** button to generate a document with the data and fields included in the search results

Open and **view** the routes by **highlighting** it and clicking the **Edit** button

Lesson 7

Route Template Documents

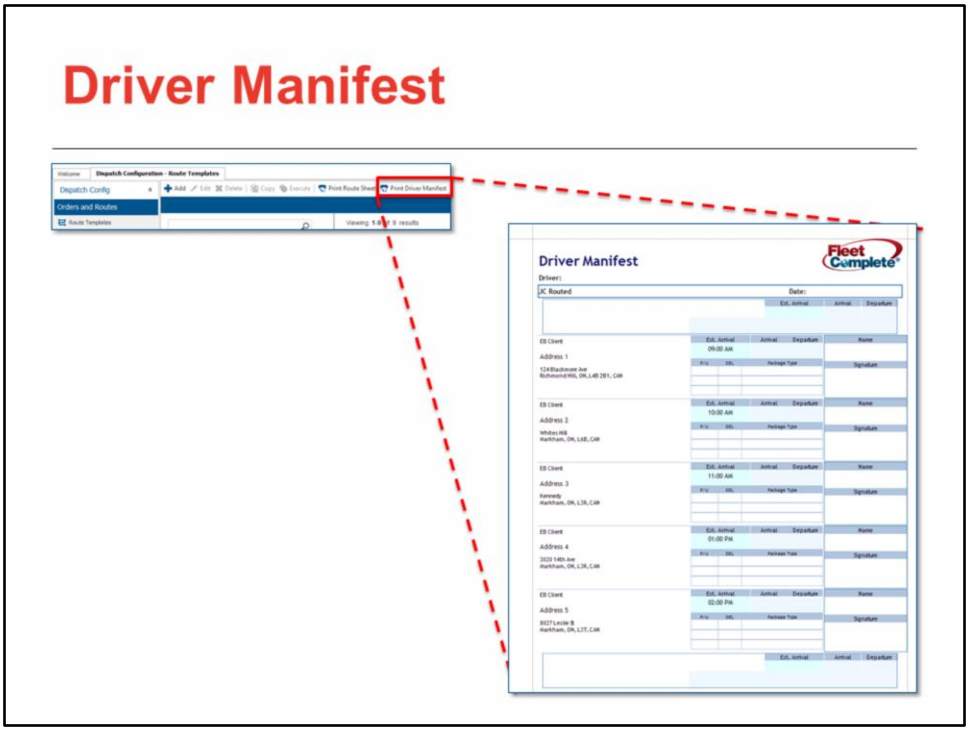
Route Sheet



Accessed from the **Route Management** screen, you have the option to print a **Route Sheet**.

This feature is used to produce a printed outline of **one or more routes** and can be **sorted by Route or by Resource.**

The sheet is populated by information about the route, including days of operations, clients, locations, ETA, stop instructions, and order details.



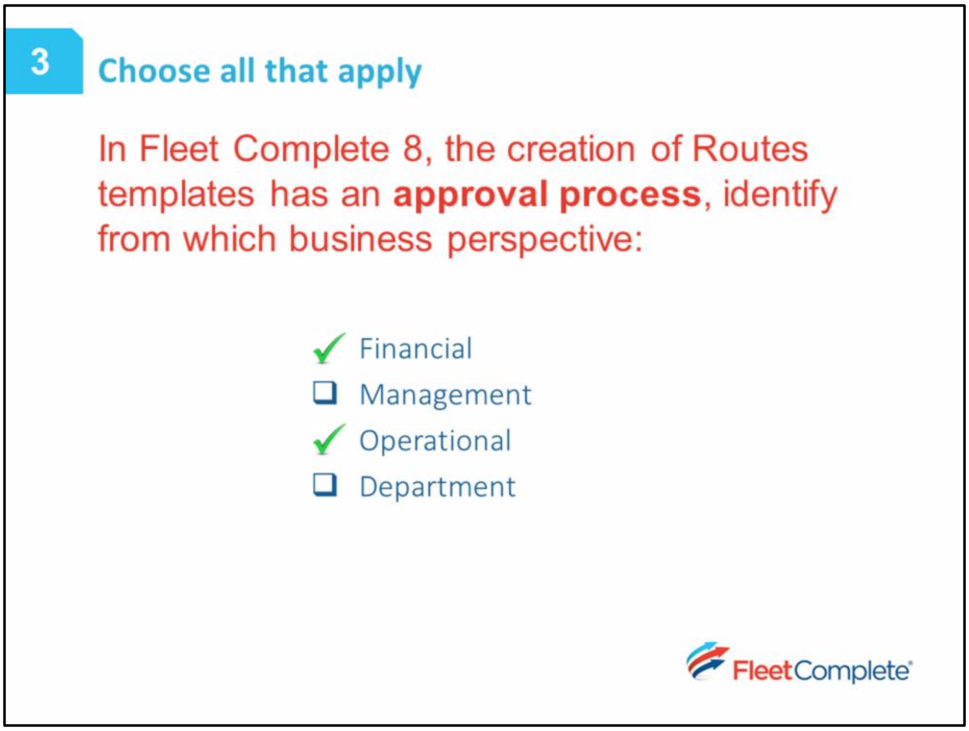
Accessed from the **Route Management** Screen, you have the option to print a **Driver Manifest**.

This feature is used to produce a printed manifest of a **single route** that can be given to a driver to complete manually.

The manifest is populated by information about the route, including clients, locations, ETA, stop instructions and order details.

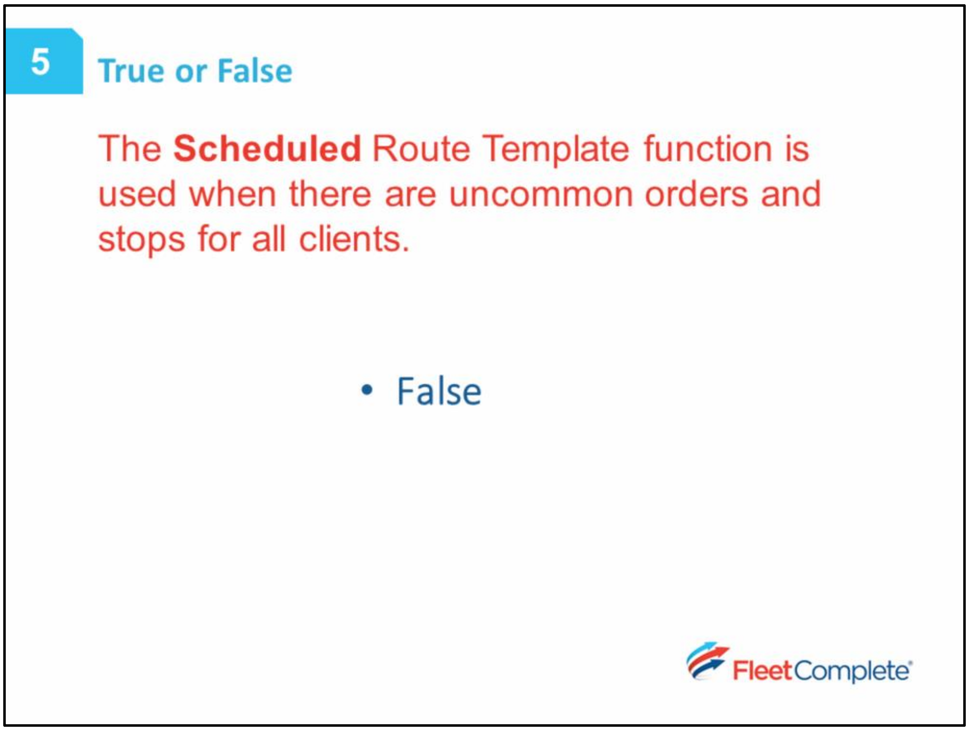
Learning Objectives

- Understand the concept of **Routing**
- Learn about route **Classifications**, **Templates** & **Instances**
- Understand the **Workflow** of Route Templates & the Workflow **Participants**
- Learn how to use the different **Search** Engine Options
- Understand the **4 Types** of Route Templates and learn their **set up requirements**
- See and example of a **Route Sheet** & a **Driver Manifest** and learn how to generate them.

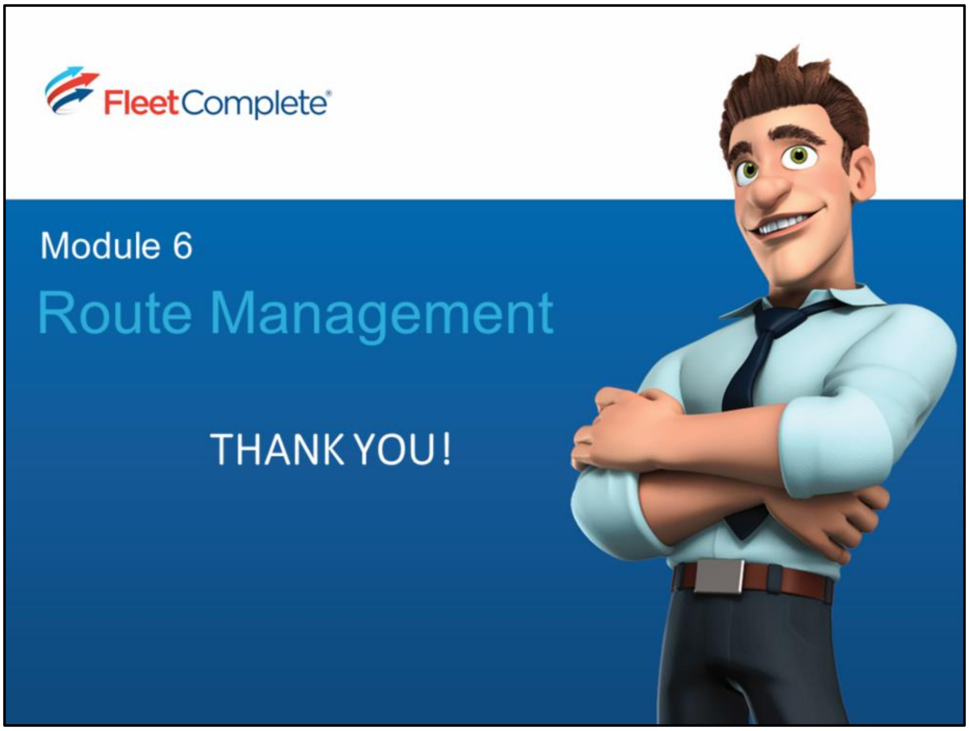


Answer:

Financial
Operational



Answer:
False
The Scheduled Route Template function is used when the same orders or stops are repeated regularly based on a schedule for one or more customers.


FleetComplete
Module 6
Route Management
THANK YOU!