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: conigurable 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

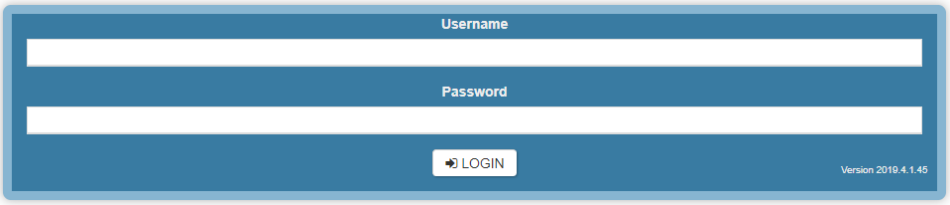

Figure 1—DRTrack Login for Dispatch, Account, Administrator Login

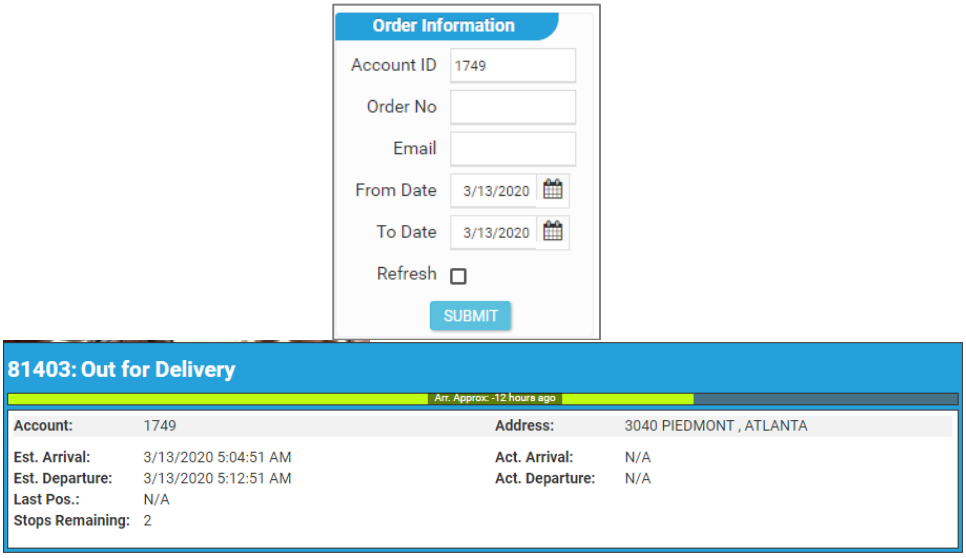

Figure 2—Customer Service Order Tracking

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 persmissions, 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.

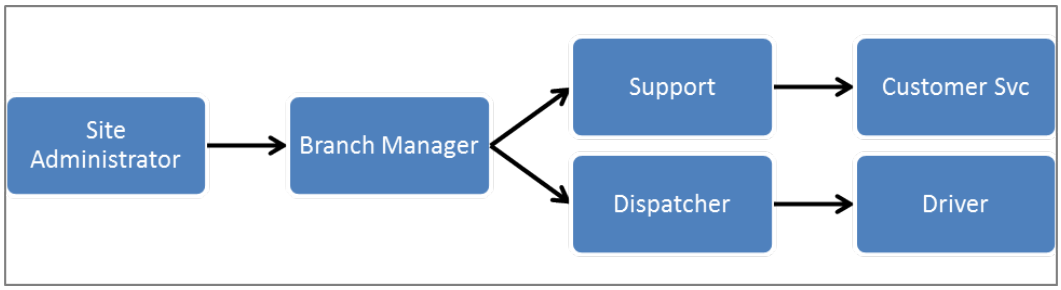

Figure 3—User Group Manager

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 heirarchy; each point within the heirarchy would have greater or lesser access/capabilities than others.

For example, the **Account Manager** role could be added to this heirarchy (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**.

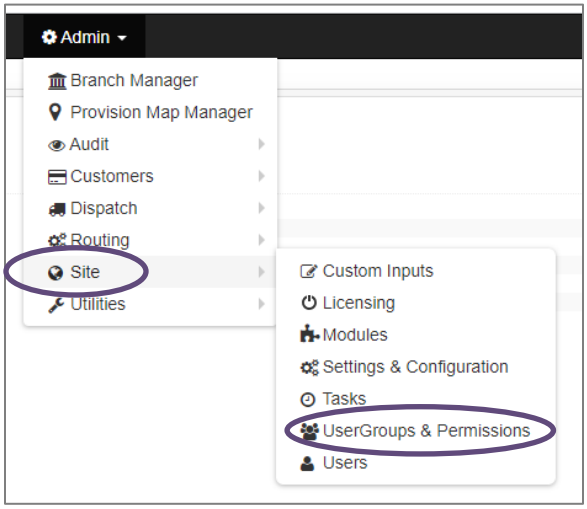

Figure 4—Manage User Groups & Permissions

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

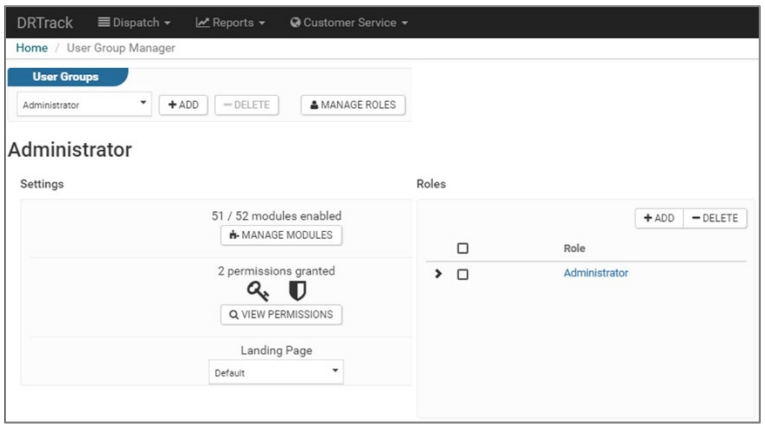

Figure 5—User Group Manager

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 6—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.

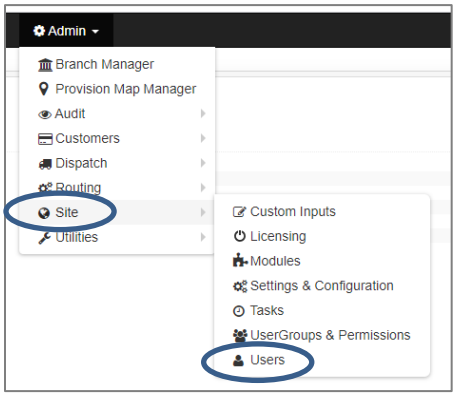

Figure 7—Manage Users

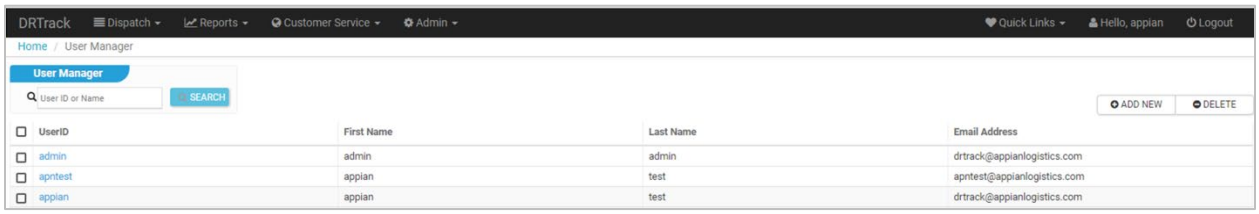

Figure 8—Create New User

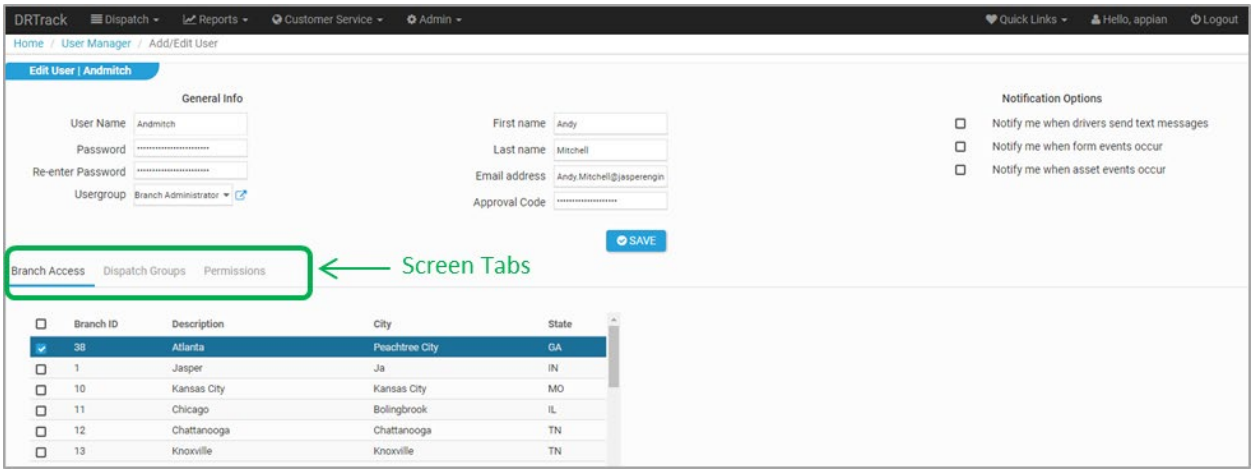

Figure 9—Assign Branches, User Groups, Permissions

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**.

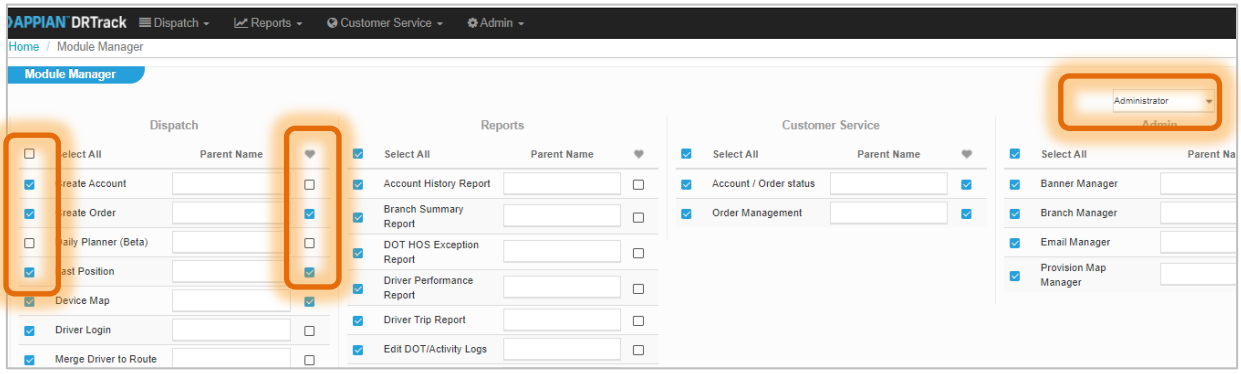

Figure 10—Manage Modules

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 rightside 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.

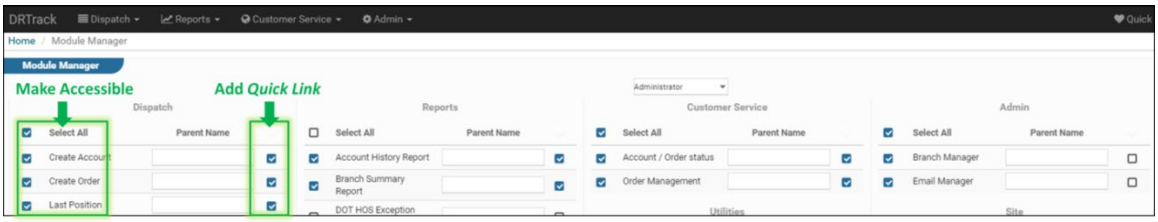

Figure 11—Make Modules Accessible

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**.

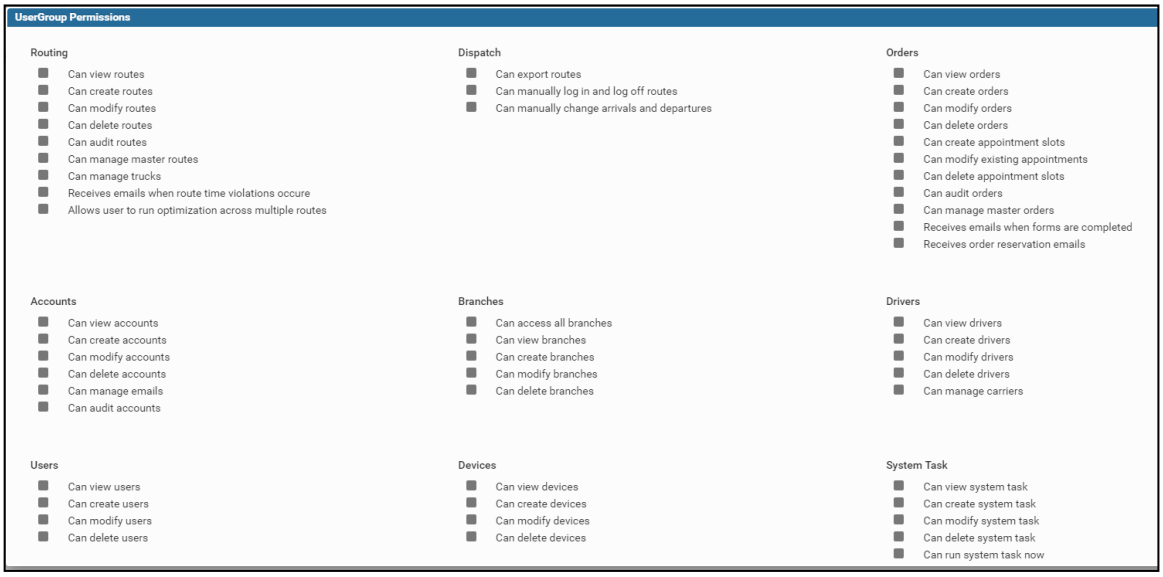

Figure 12—View Permissions

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 13—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 eack 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 peferred 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 hte 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

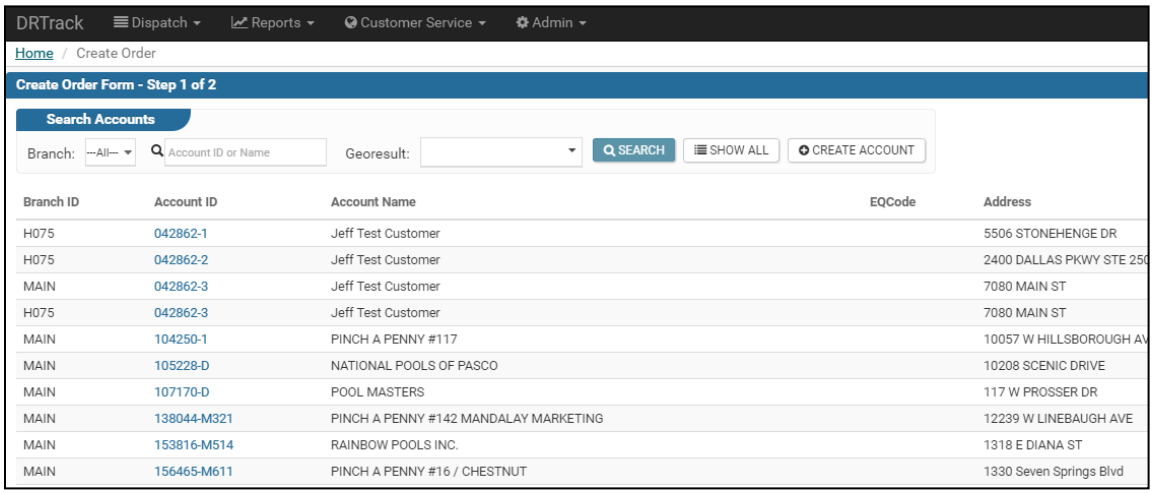

Figure 14—Create Order Step 1

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

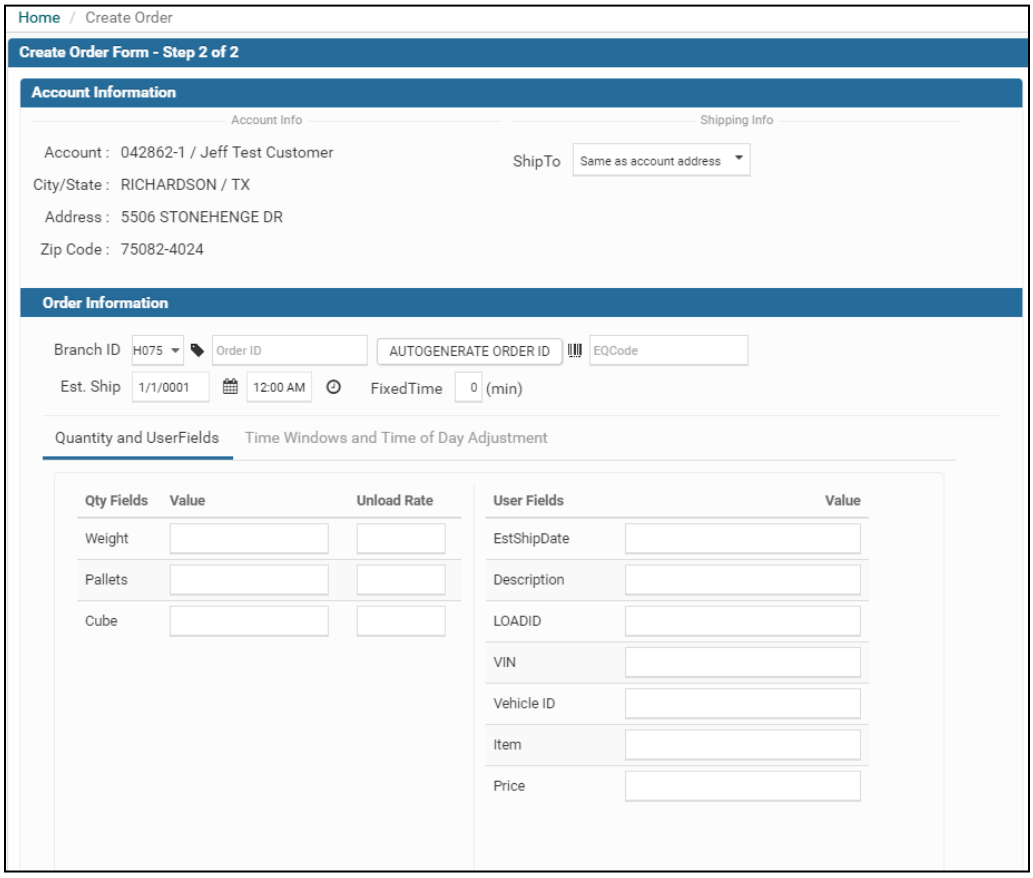

Figure 15—Create Order Step 2

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

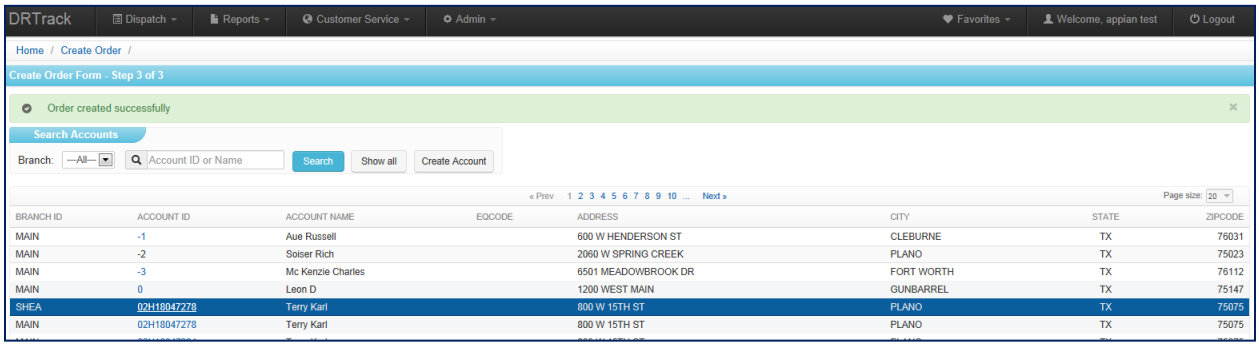

Figure 16—Order Confirmation Step 3

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.

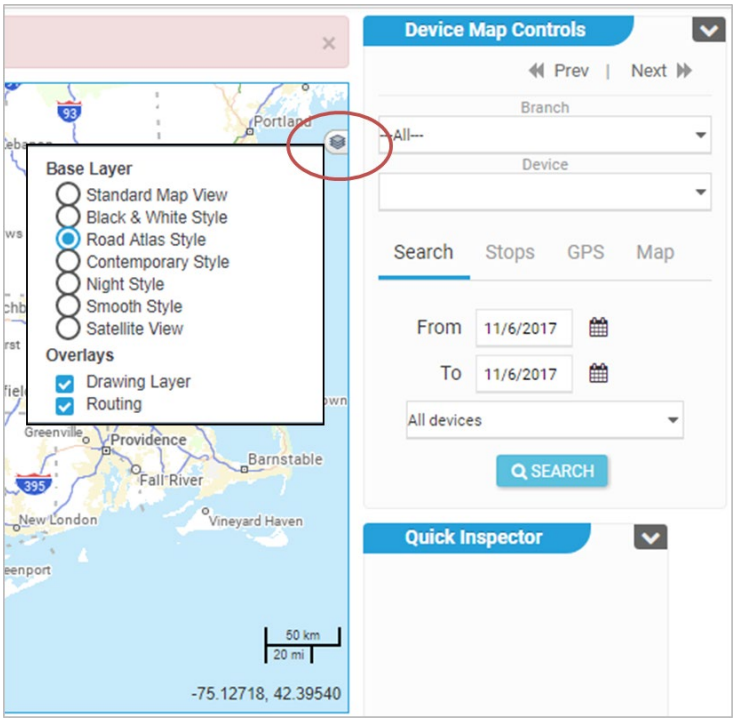

Figure 17—Select Map Style and Overlays

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*

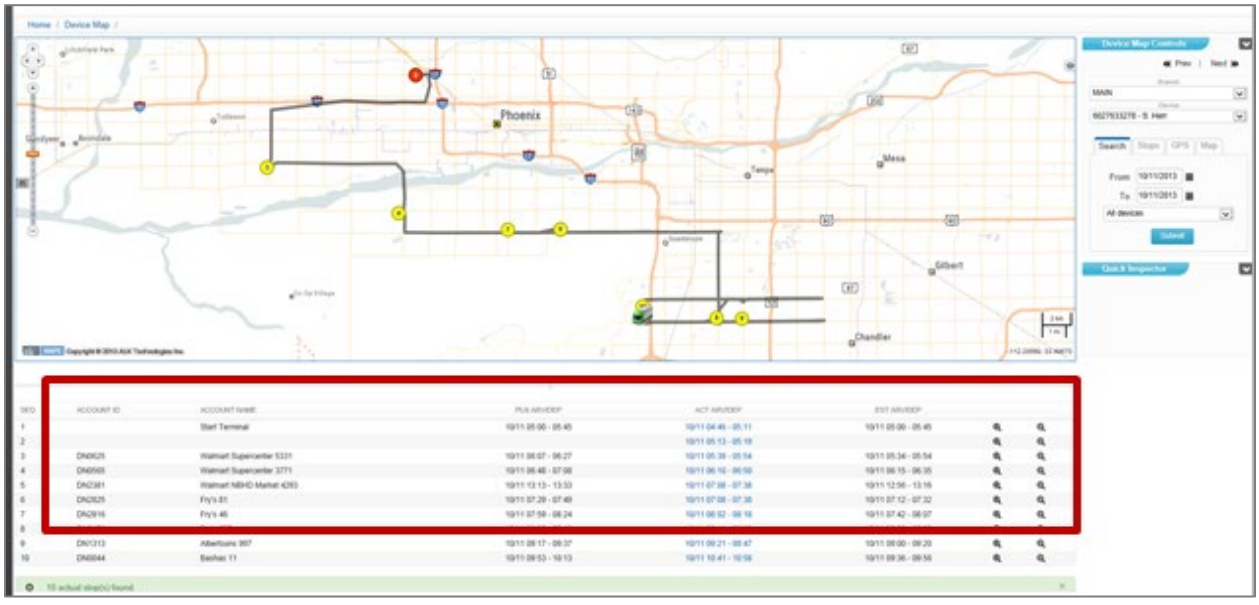

Figure 18—Device Map

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.

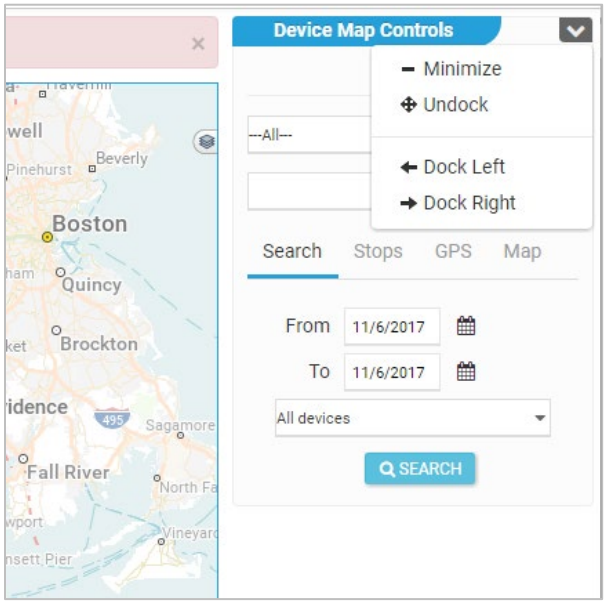

Figure 19—Device Selection, Device Map Controls

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 20—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.

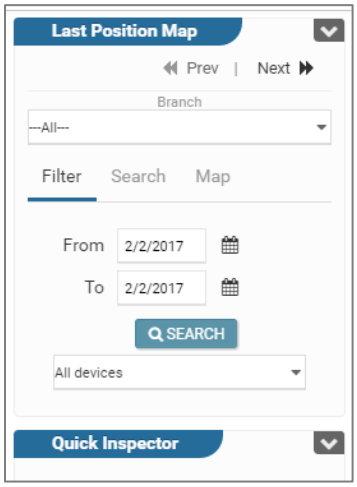

Figure 21—Device Last Position

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

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

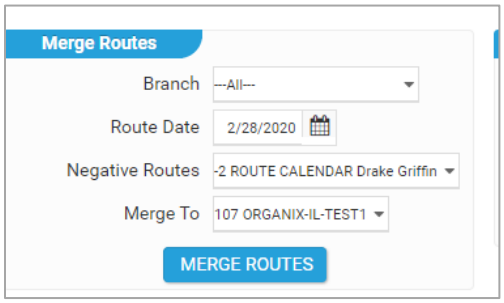

Figure 22—Merge Routes

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

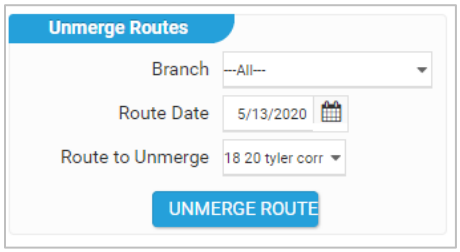

Figure 23—Unmerge Routes

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

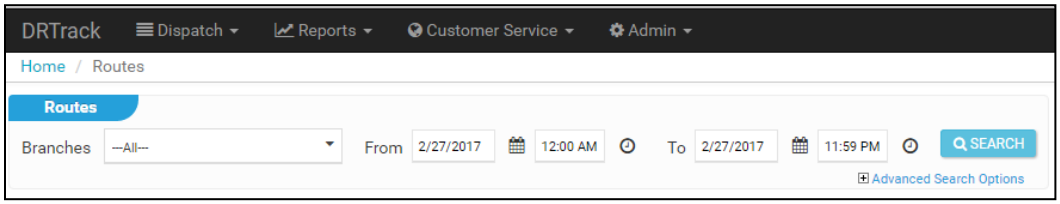

Figure 24—Dispatch Routes

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)

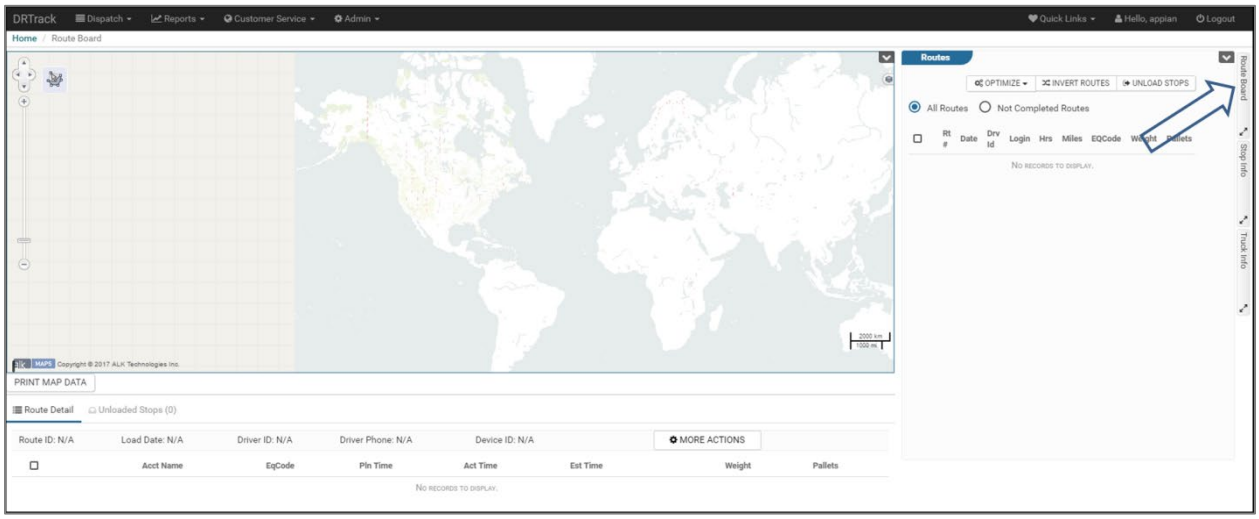

Figure 25—Route Board

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)

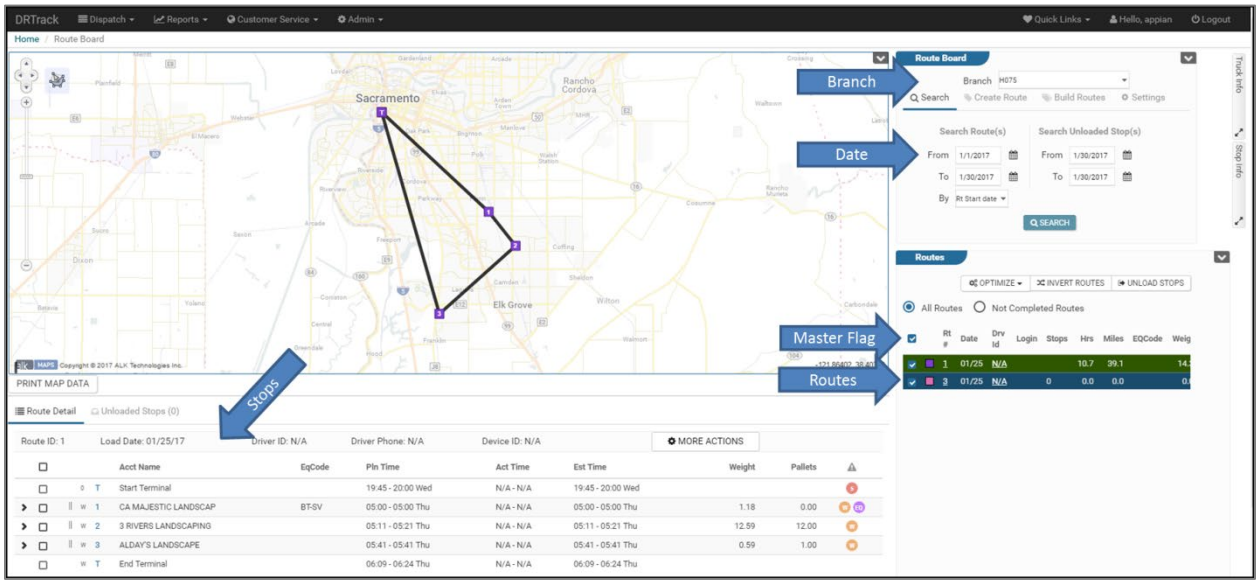

Figure 26—Route Board Properties

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.*

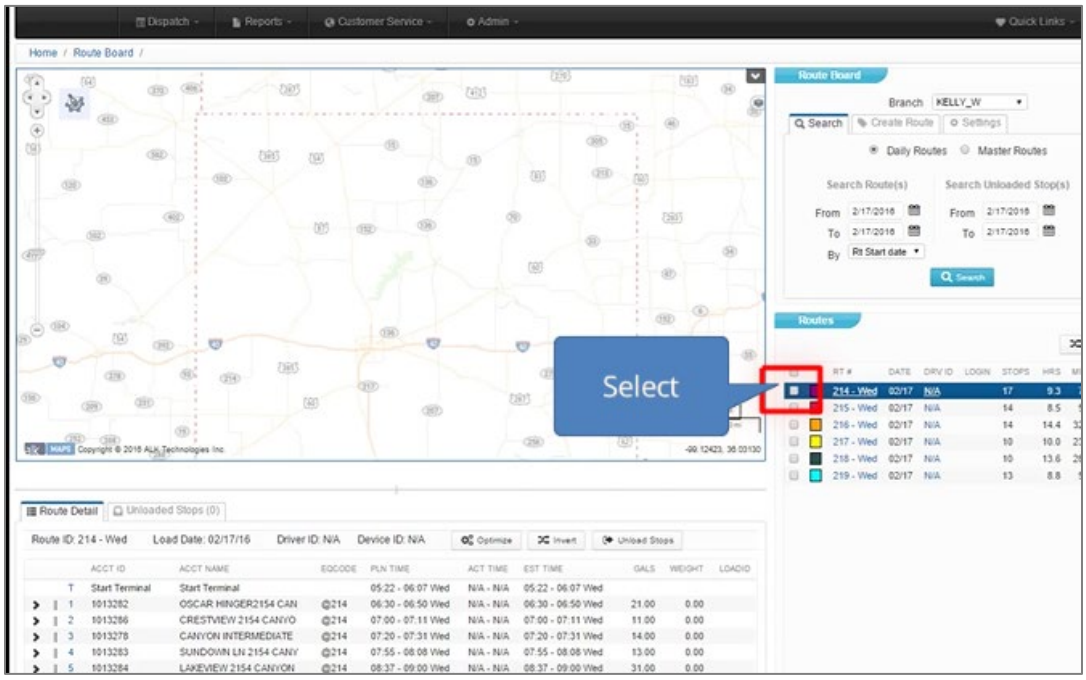

Figure 27—Route Selection

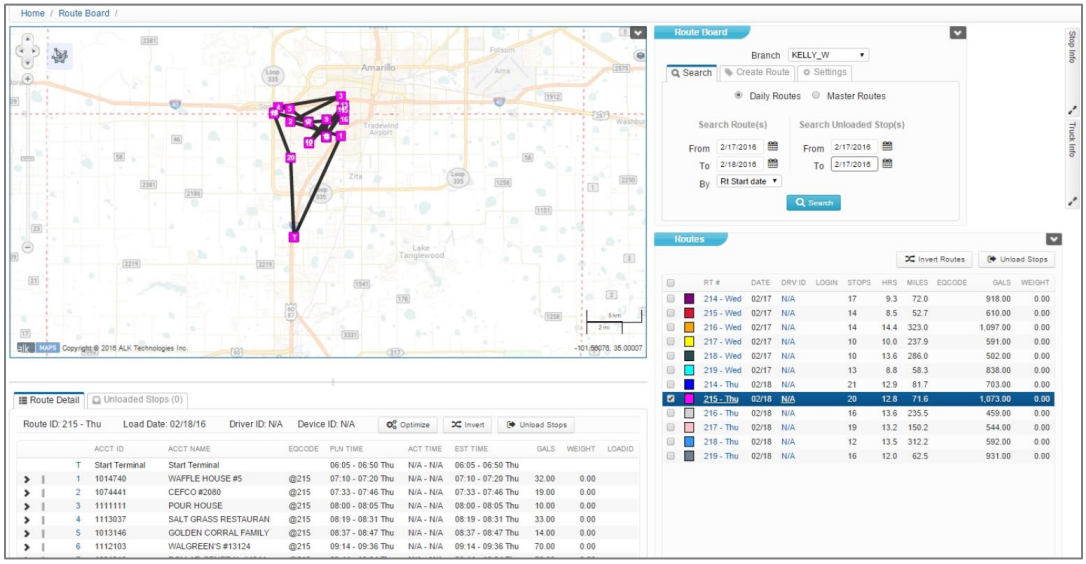

Figure 28—Route Board Map

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.

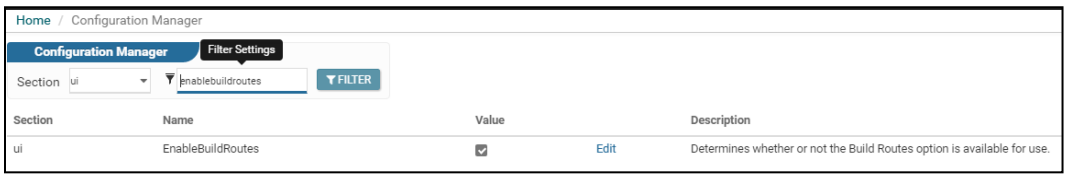

Figure 29—Enable Build Routes

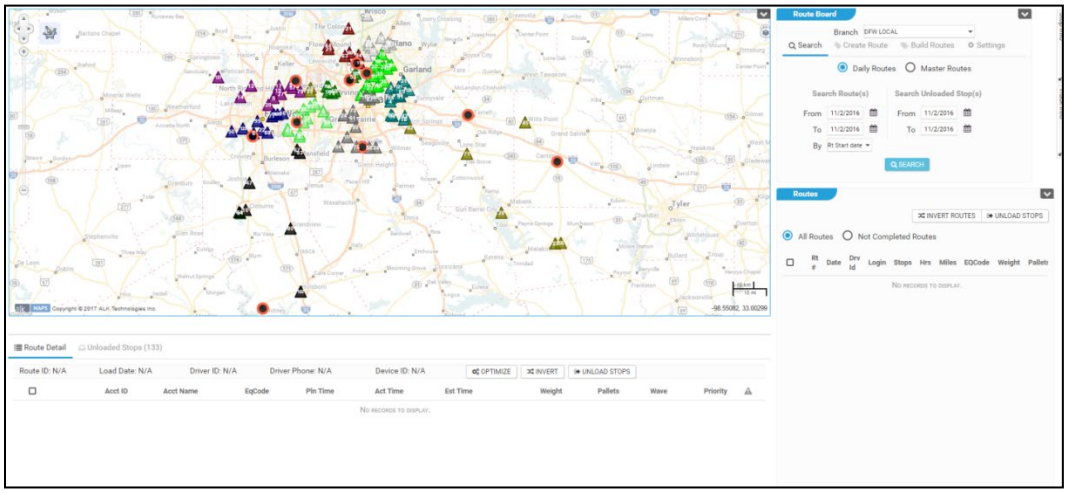

Figure 30—Empty Daily Routes (Route Board)

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

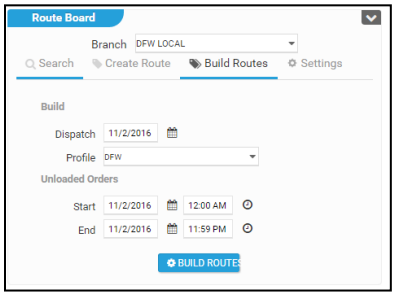

Figure 31—Build Routes Tab

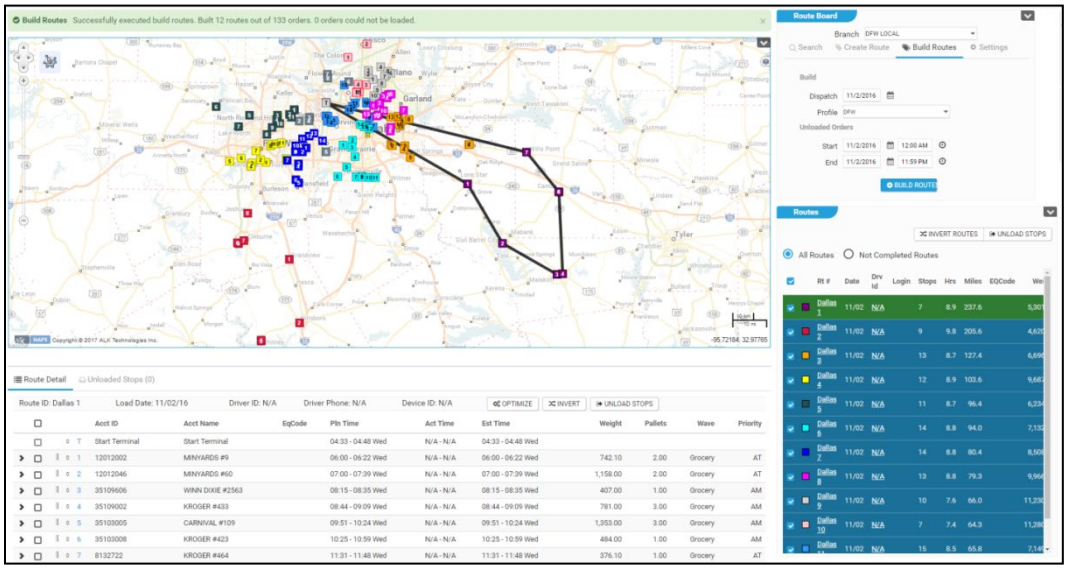

Figure 32—Build Routes Results

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 visbility through out 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.

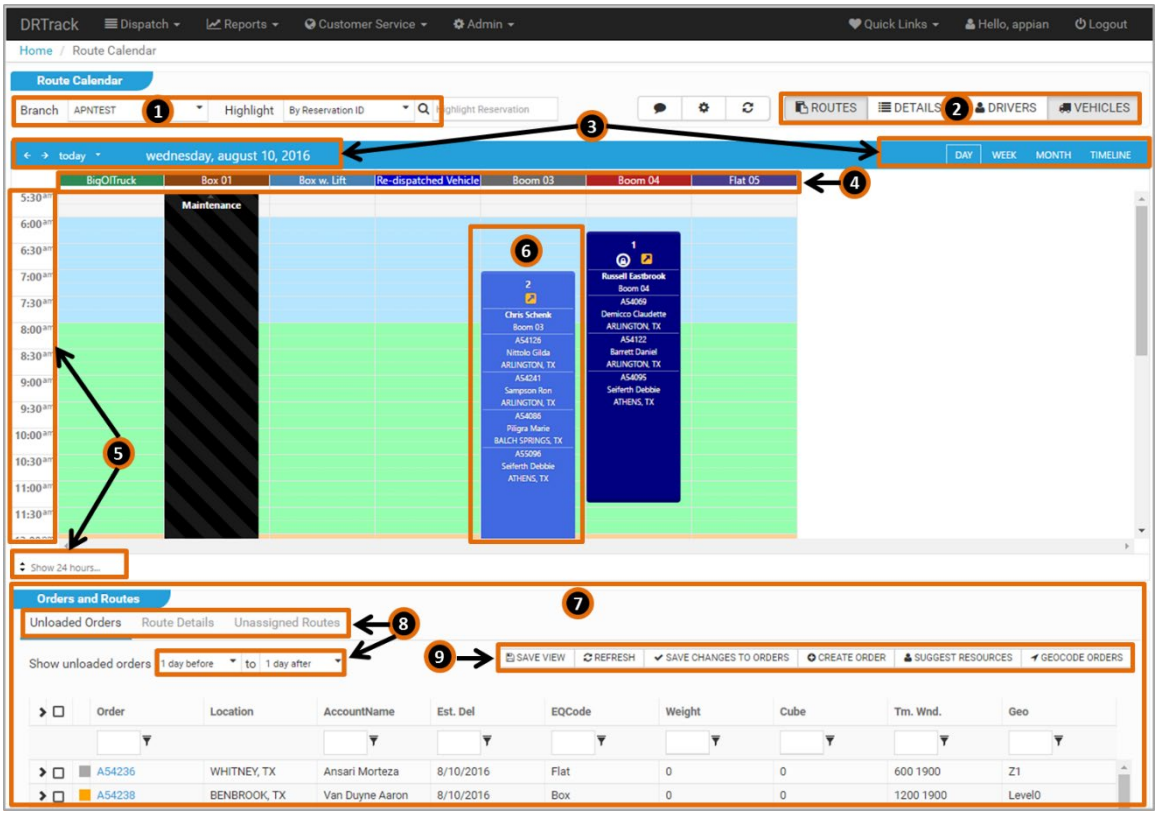

Figure 33—Route Calendar

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*.

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.

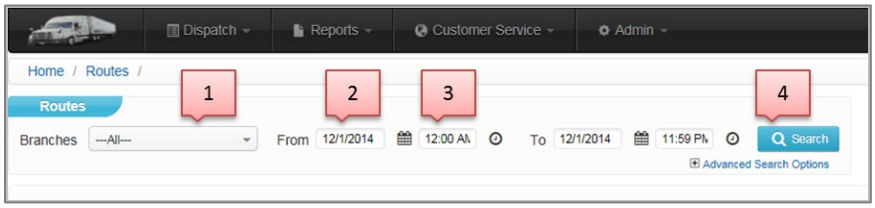

Figure 34—Routes Page Search

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

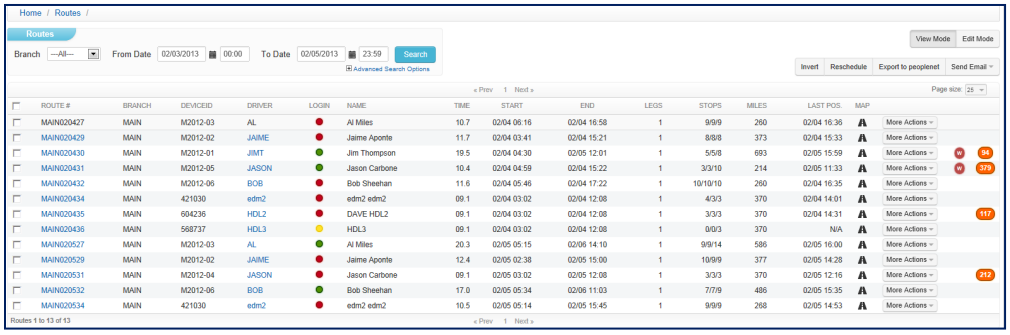

Figure 35—Routes Page

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
- —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.

« Prev 1 Next »

		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	
›	E	402	101MI	107433	6934		Rob Sydor	52.5	04/02 04:00	04/04 08:28	1	0/0/6	096	N/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	
›	E	404	101MI	621247	62969		Cory Kirkland	11.2	04/02 04:00	04/02 15:11	1	0/0/5	094	N/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	
›	E	406	101MI	621248	7234		Russ Williams	12.2	04/02 04:00	04/02 16:10	1	0/0/6	133	N/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	
›	E	408	101MI	666262	7719		Don Wilber	21.7	04/02 04:00	04/03 01:39	1	0/0/8	576	N/A	

Figure 36—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

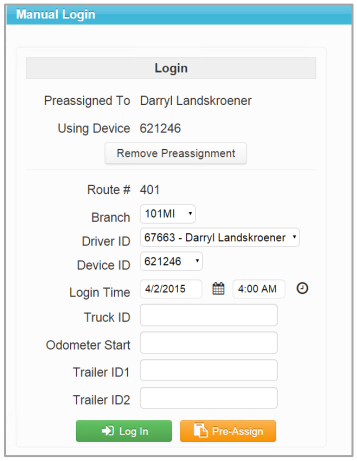

Figure 37—Manual Driver Login

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

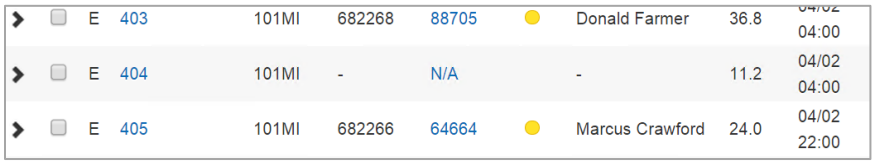

Figure 38—Driver Pre-Assignment Removed

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*)

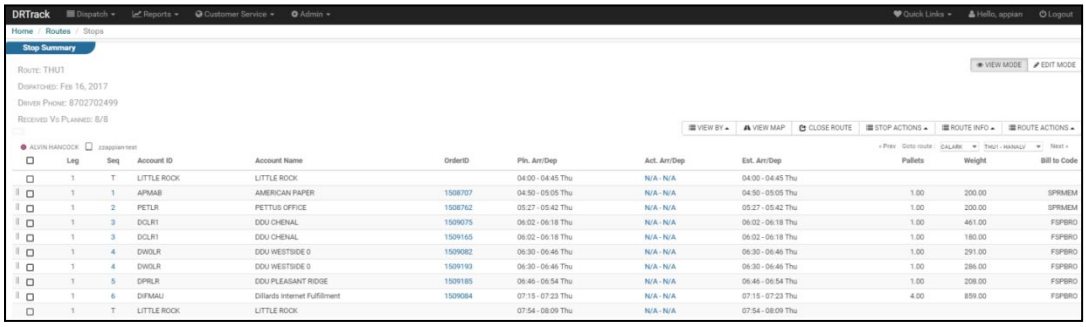

Figure 39—Stop Summary

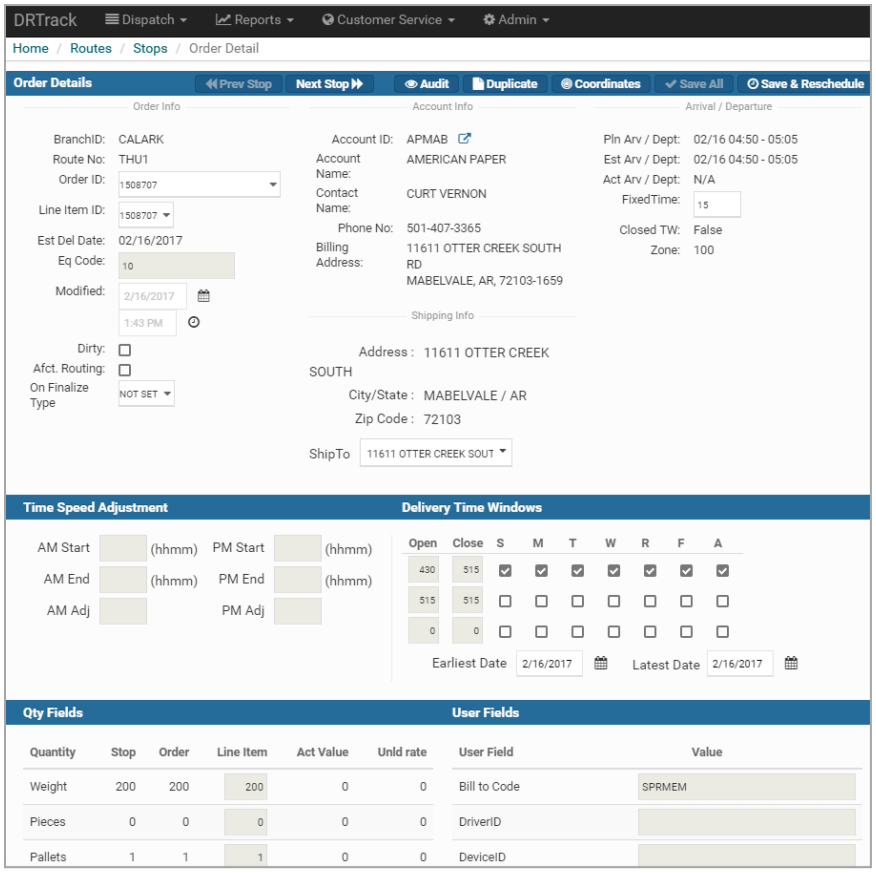

Figure 40—Order Details Summary

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

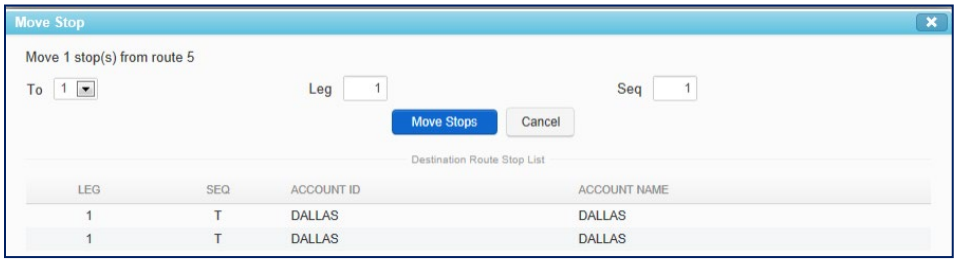

Figure 41—Move Stops

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

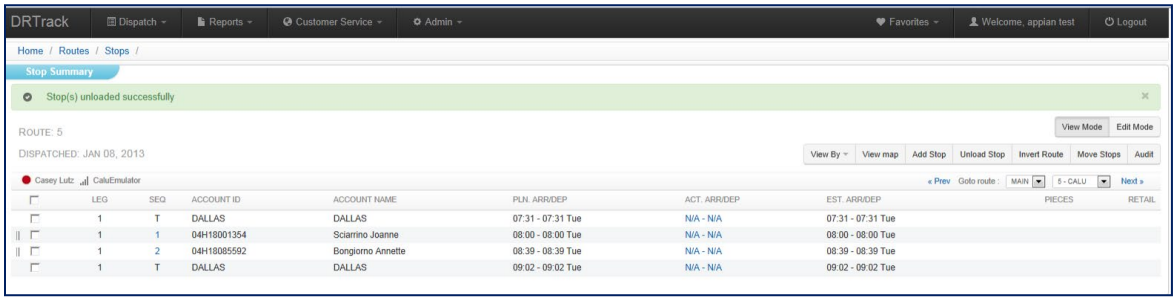

Figure 42—Unload Confirmation

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*

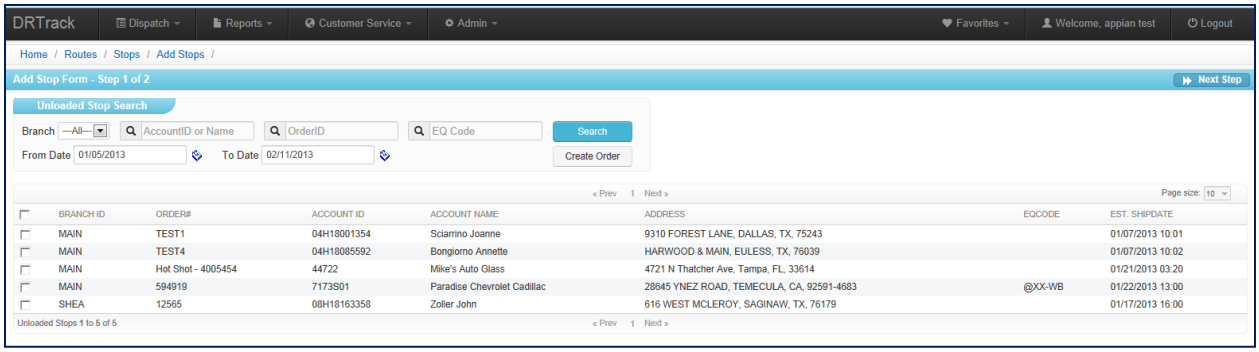

Figure 43—Add a Stop

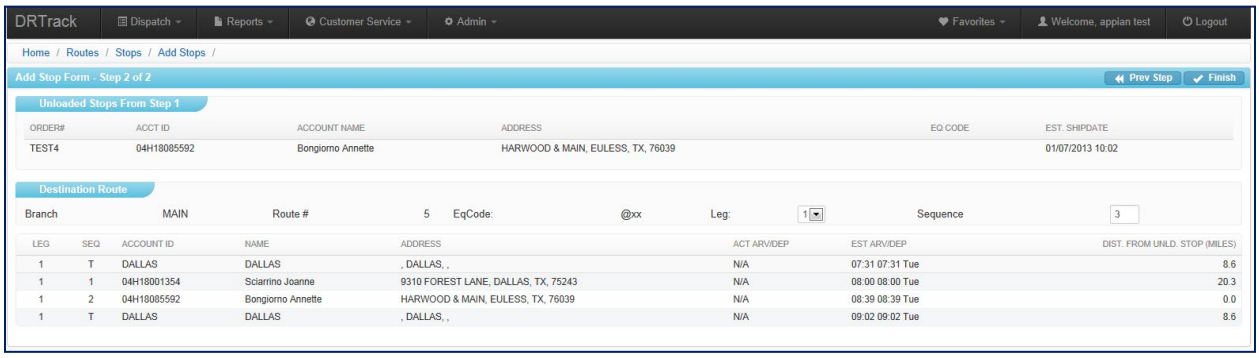

Figure 44—Edit Leg/Sequence Number

Route Map

Map views for each route can be accessed by clicking on the map icon adjacent 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.

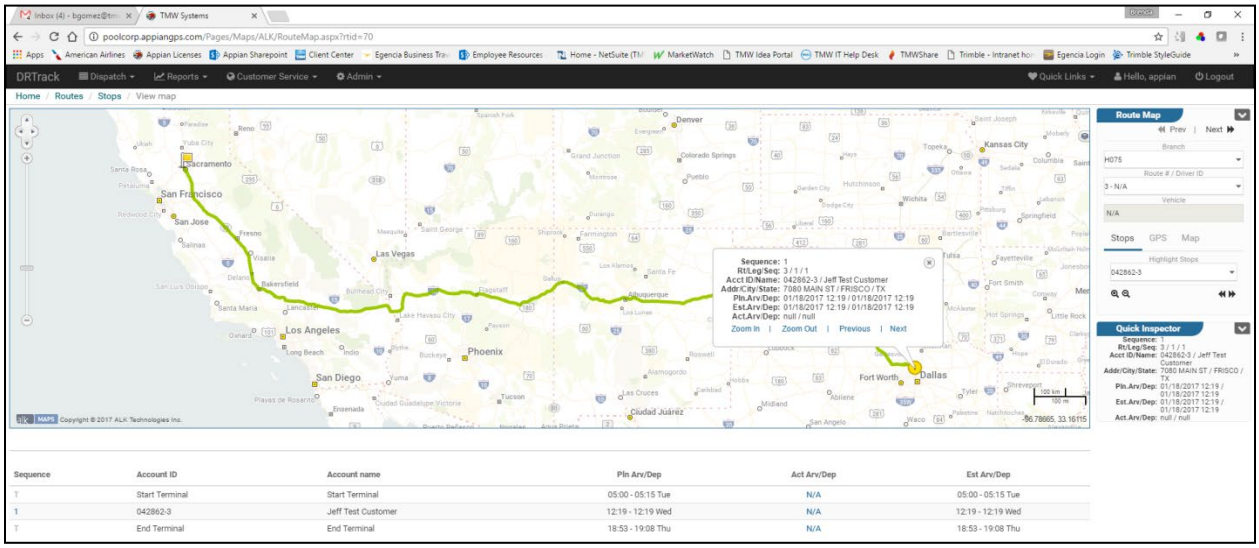

Figure 45—Map View of Planned Routes

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

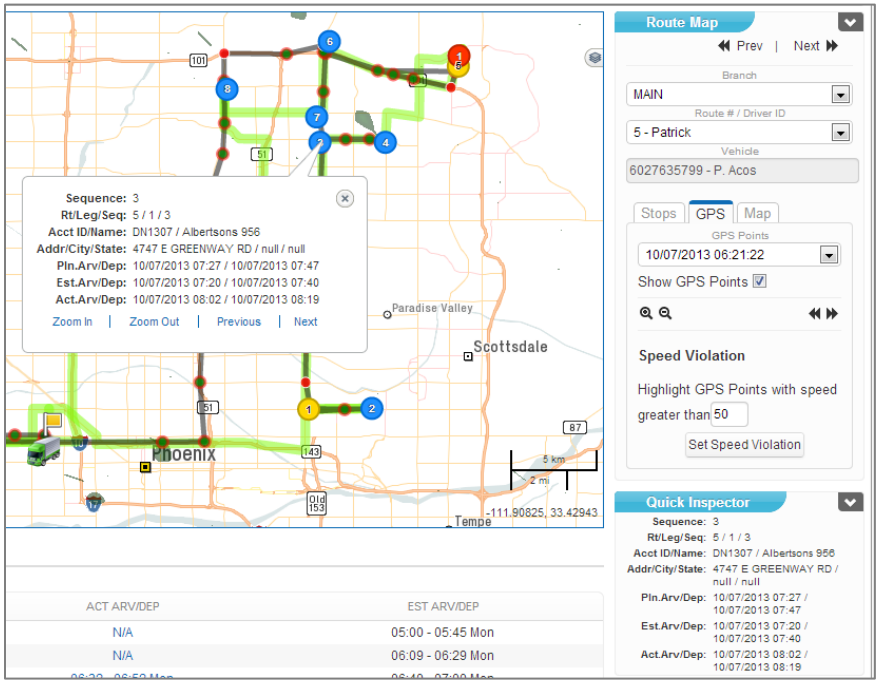

Figure 46—Show GPS Points

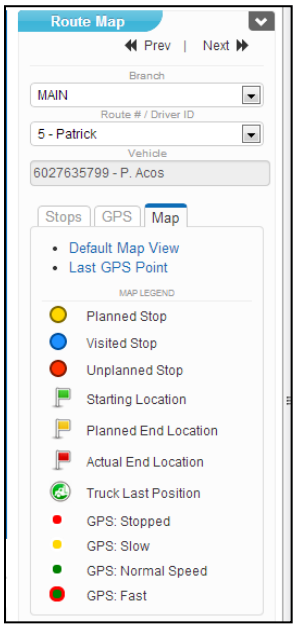

Figure 47—Map Markers

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)

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.

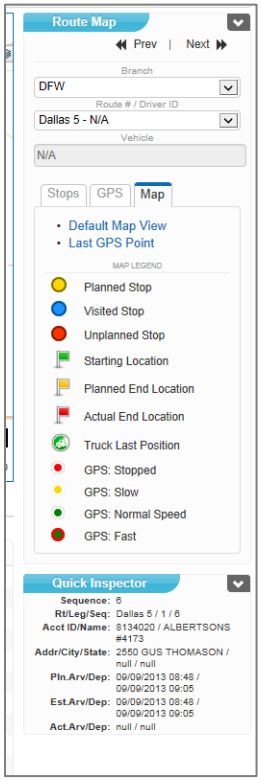

Figure 48—Quick Inspector Box

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

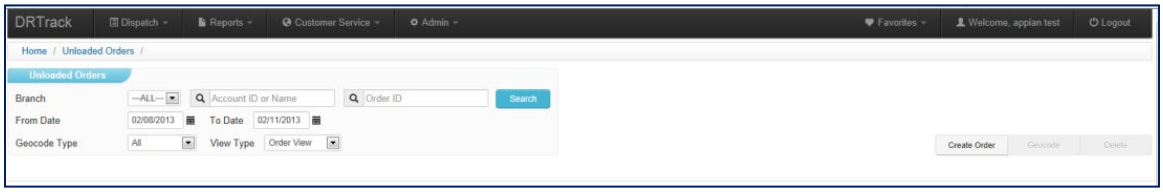

Figure 49—Search Unloaded Orders

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.

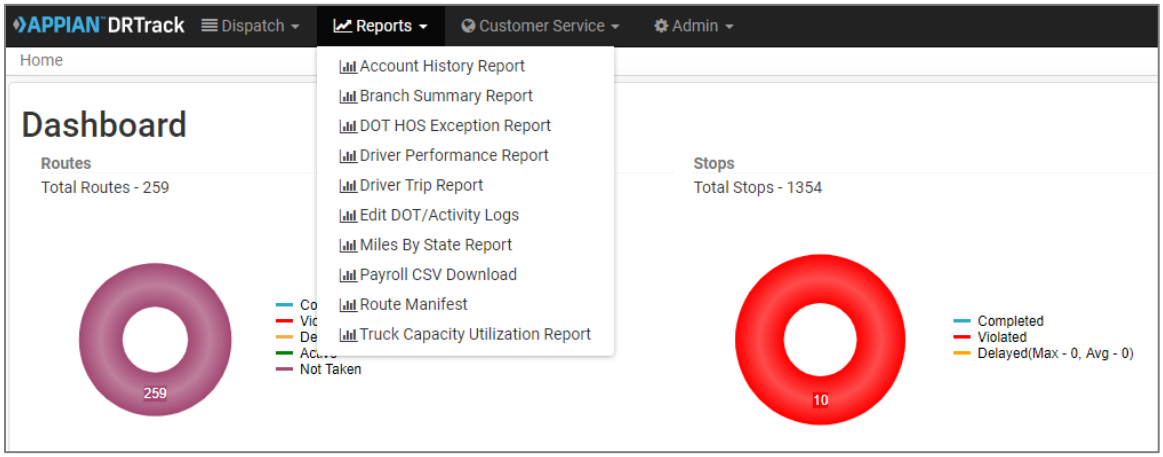

Figure 50—DRTrack Reports

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—Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
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—Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Time Analysis Report—Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
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*

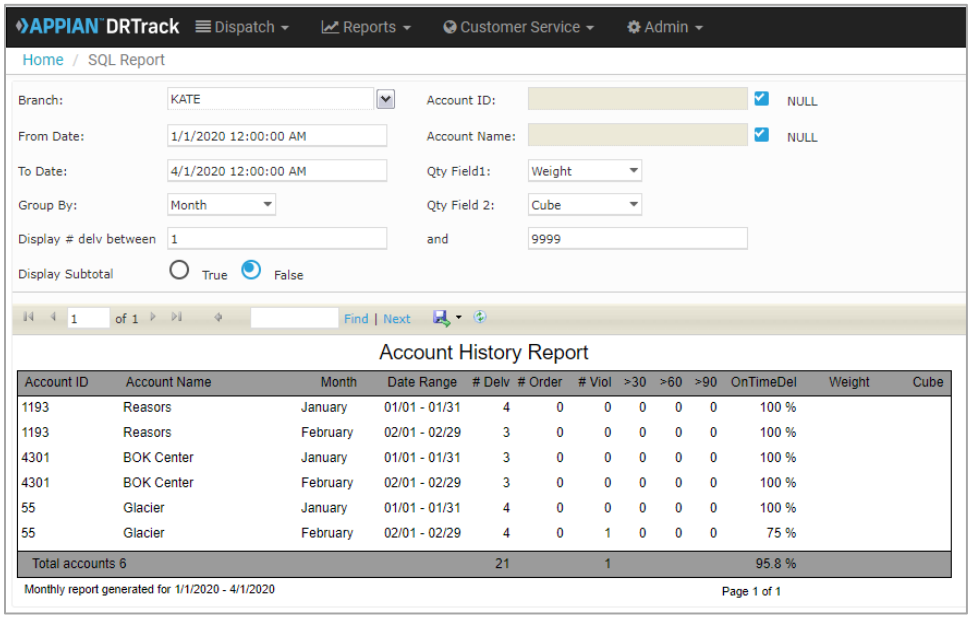

Figure 51—Account History Report

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*

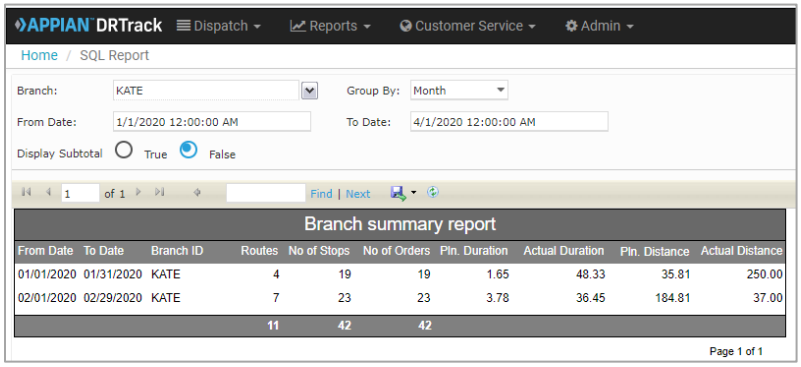

Figure 52—Branch Summary Report

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.

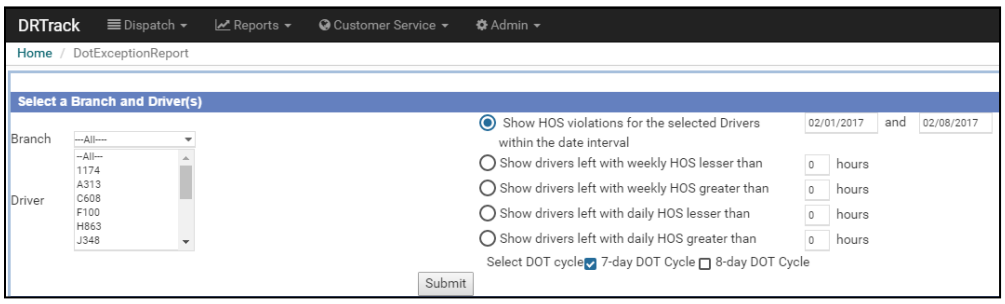

Figure 53—DOT Exception Report

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

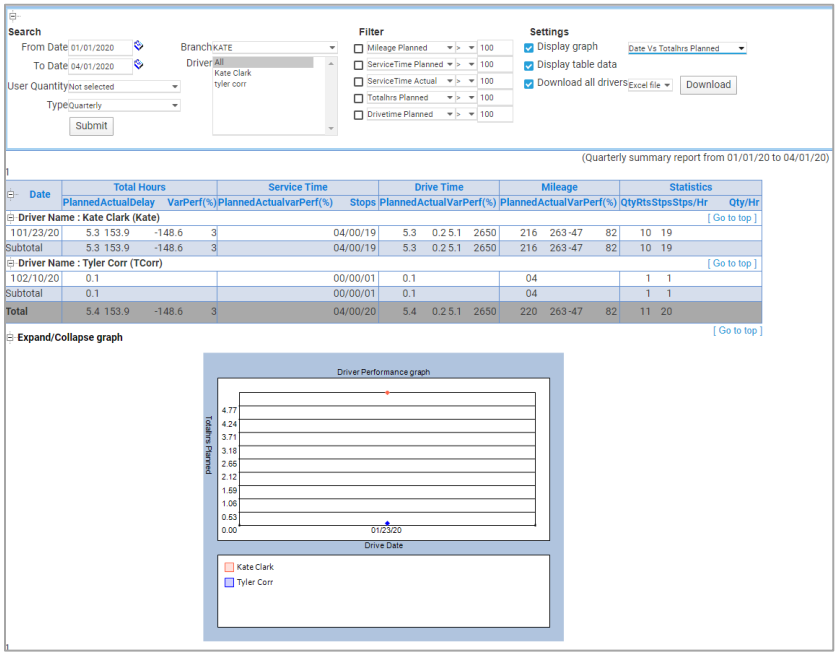

Figure 54—Driver Performance Report

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

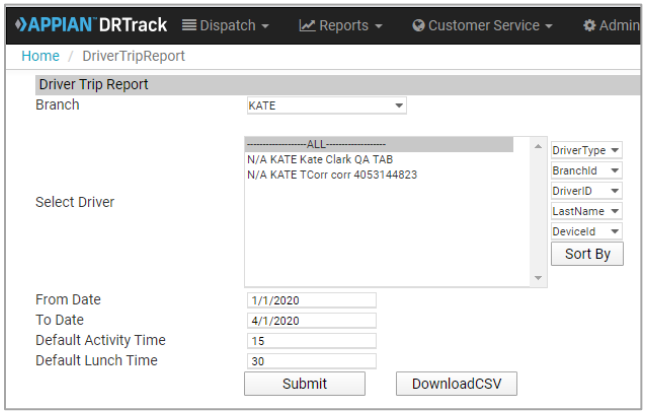

Figure 55—Driver Trip Report

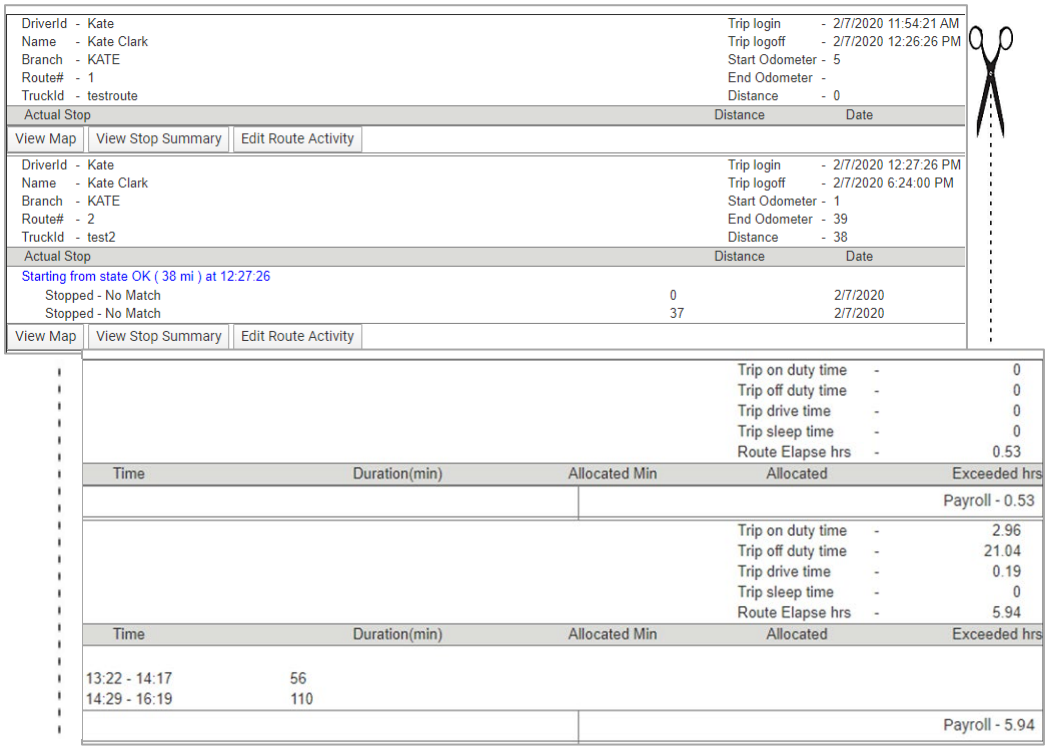

Figure 56—Driver Trip Report Results

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

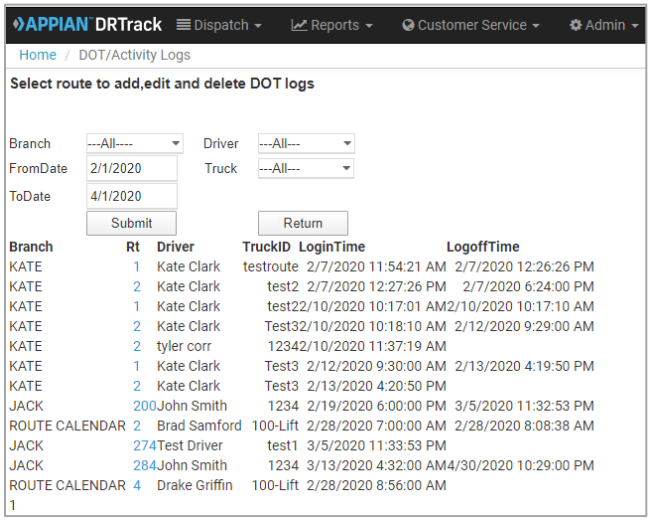

Figure 57—DOT/Activity Log

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

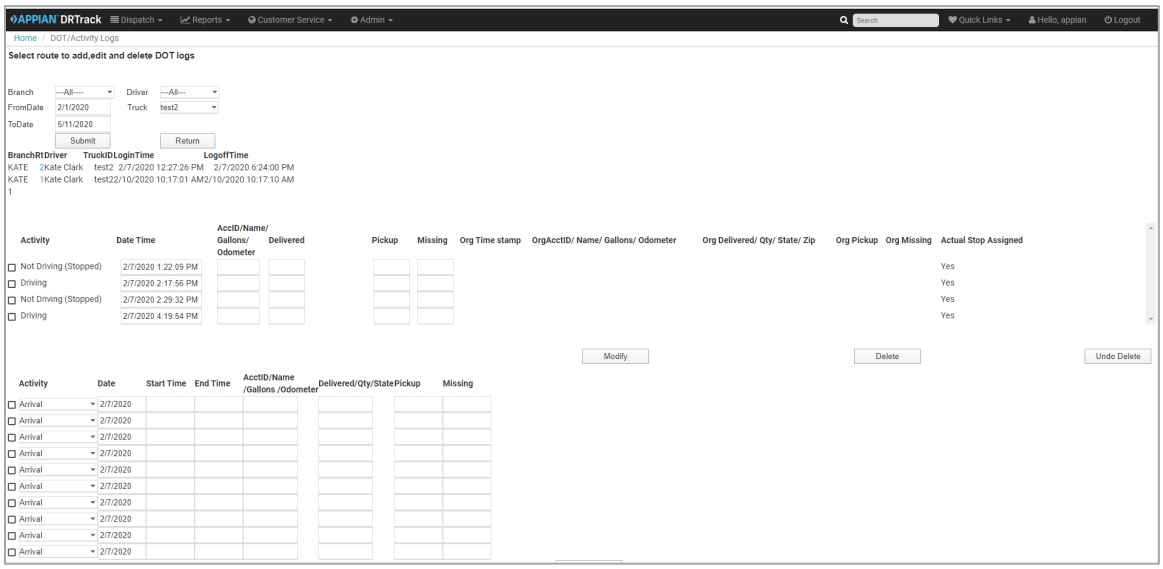

Figure 58—DOT/Activity Log Results

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.

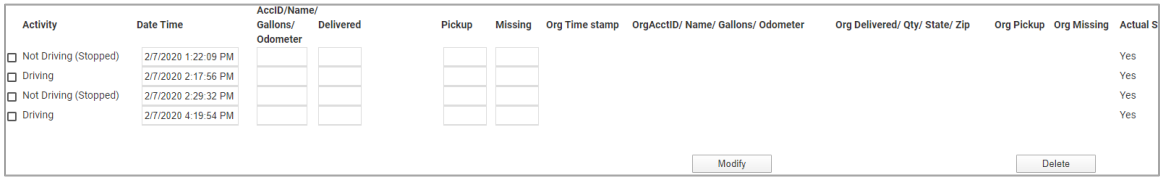

Figure 59—Edit DOT/Activity Log

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.

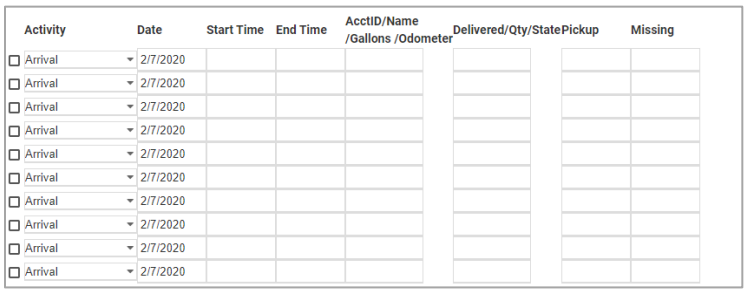

Figure 60—Add New Routes to DOT/Activity Log

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

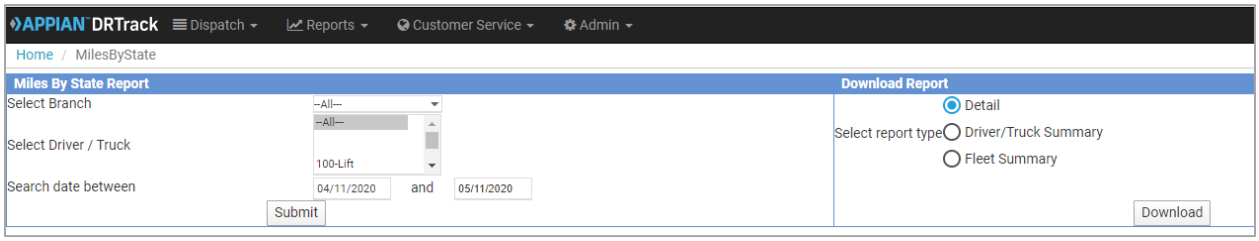

Figure 61—Miles by State Report Request

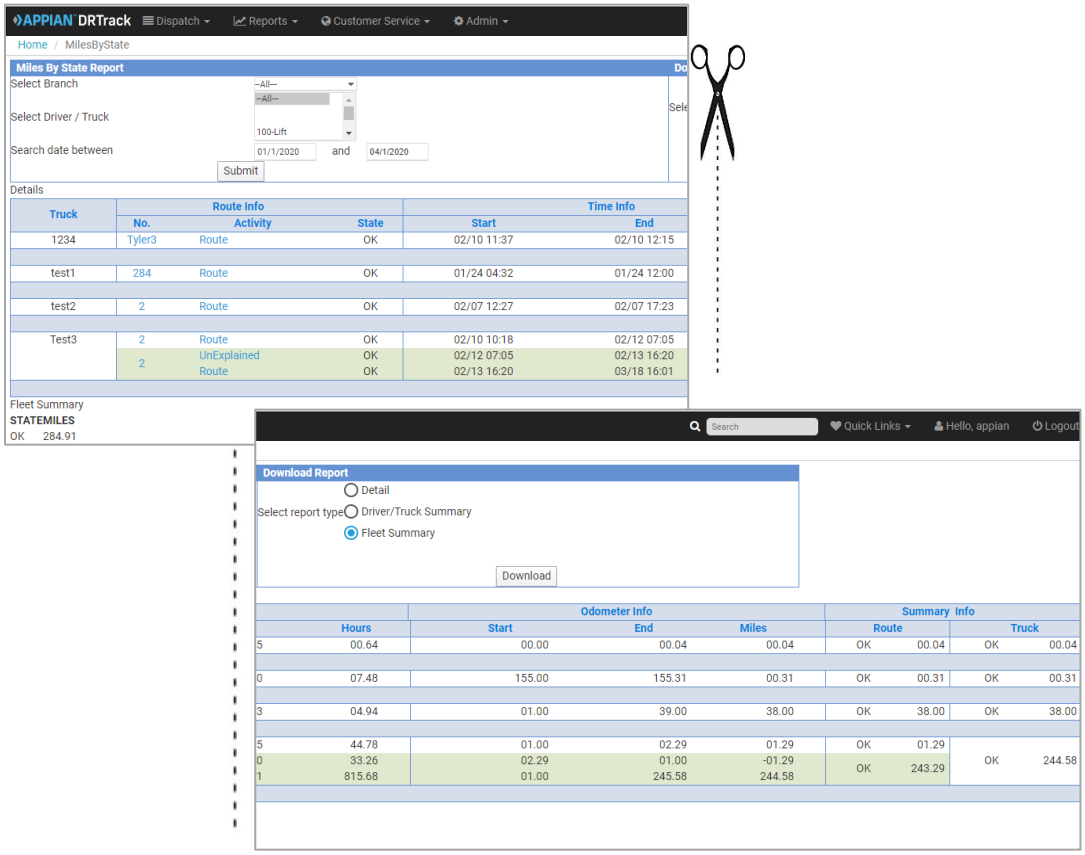

Figure 62—Miles by State Summary Report

Payroll CSV Report

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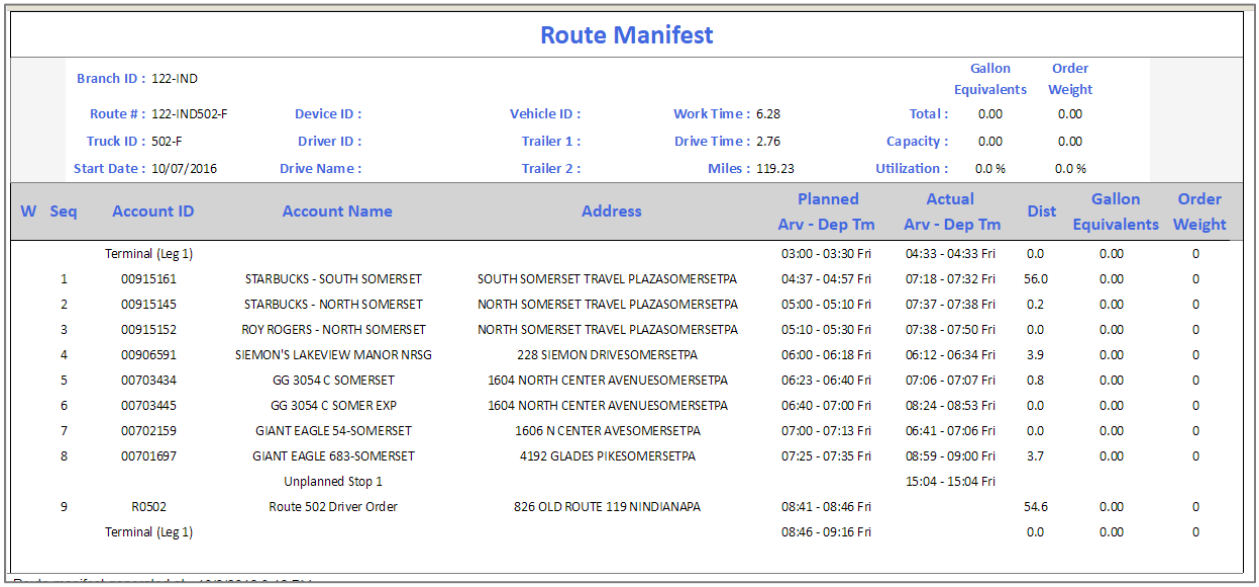
Route Manifest

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 is 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



Route Manifest

Branch ID : 122-IND

					Gallon Equivalents	Order Weight
Route # : 122-IND502-F	Device ID :	Vehicle ID :	Work Time : 6.28	Total :	0.00	0.00
Truck ID : 502-F	Driver ID :	Trailer 1 :	Drive Time : 2.76	Capacity :	0.00	0.00
Start Date : 10/07/2016	Drive Name :	Trailer 2 :	Miles : 119.23	Utilization :	0.0 %	0.0 %

W	Seq	Account ID	Account Name	Address	Planned Arv - Dep Tm	Actual Arv - Dep Tm	Dist	Gallon Equivalents	Order Weight
		Terminal (Leg 1)			03:00 - 03:30 Fri	04:33 - 04:33 Fri	0.0	0.00	0
	1	00915161	STARBUCKS - SOUTH SOMERSET	SOUTH SOMERSET TRAVEL PLAZASOMERSETPA	04:37 - 04:57 Fri	07:18 - 07:32 Fri	56.0	0.00	0
	2	00915145	STARBUCKS - NORTH SOMERSET	NORTH SOMERSET TRAVEL PLAZASOMERSETPA	05:00 - 05:10 Fri	07:37 - 07:38 Fri	0.2	0.00	0
	3	00915152	ROY ROGERS - NORTH SOMERSET	NORTH SOMERSET TRAVEL PLAZASOMERSETPA	05:10 - 05:30 Fri	07:38 - 07:50 Fri	0.0	0.00	0
	4	00906591	SIEMON'S LAKEVIEW MANOR NRSG	228 SIEMON DRIVESOMERSETPA	06:00 - 06:18 Fri	06:12 - 06:34 Fri	3.9	0.00	0
	5	00703434	GG 3054 C SOMERSET	1604 NORTH CENTER AVENUESOMERSETPA	06:23 - 06:40 Fri	07:06 - 07:07 Fri	0.8	0.00	0
	6	00703445	GG 3054 C SOMER EXP	1604 NORTH CENTER AVENUESOMERSETPA	06:40 - 07:00 Fri	08:24 - 08:53 Fri	0.0	0.00	0
	7	00702159	GIANT EAGLE 54-SOMERSET	1606 N CENTER AVESOMERSETPA	07:00 - 07:13 Fri	06:41 - 07:06 Fri	0.0	0.00	0
	8	00701697	GIANT EAGLE 683-SOMERSET	4192 GLADES PIKESOMERSETPA	07:25 - 07:35 Fri	08:59 - 09:00 Fri	3.7	0.00	0
			Unplanned Stop 1			15:04 - 15:04 Fri			
	9	R0502	Route 502 Driver Order	826 OLD ROUTE 119 NINDIANAPA	08:41 - 08:46 Fri		54.6	0.00	0
		Terminal (Leg 1)			08:46 - 09:16 Fri		0.0	0.00	0

Figure 63—Route Manifest Report

Scorecard Report

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Time Analysis Report

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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 perioeds 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 64—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.

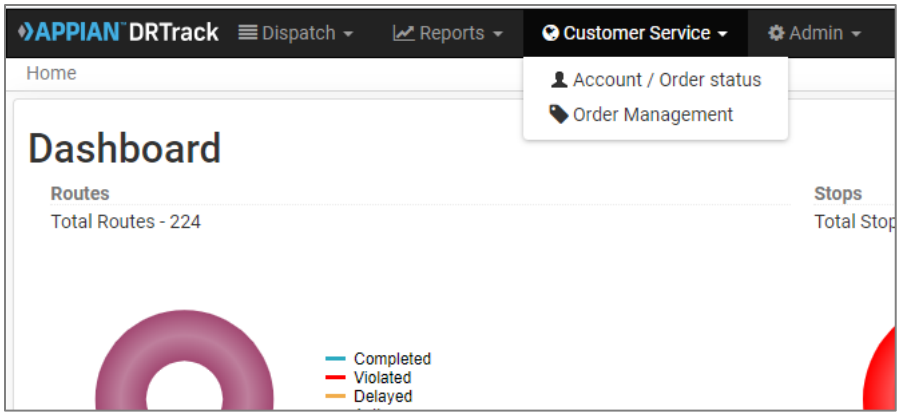


Figure 65—Customer Service

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 in this screen.

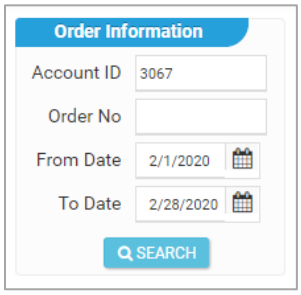


Figure 66—Account/Order Status Search

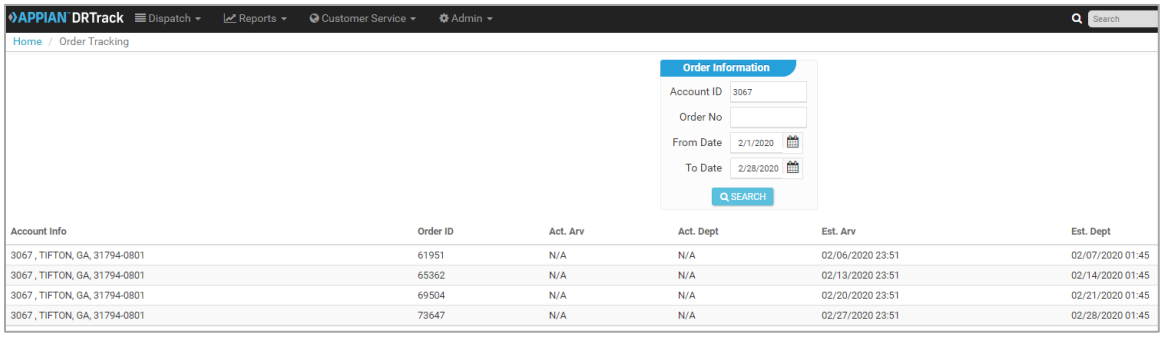


Figure 67—Account/Order Status Search Result

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*.

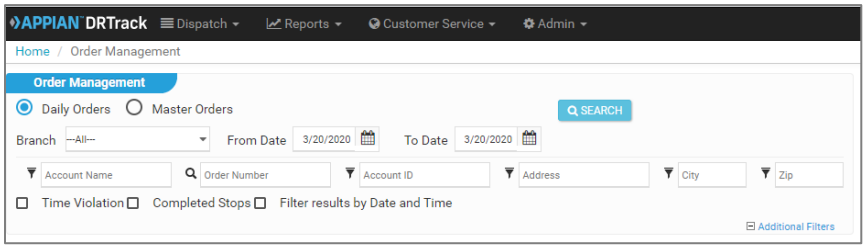


Figure 68—Order Management

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.

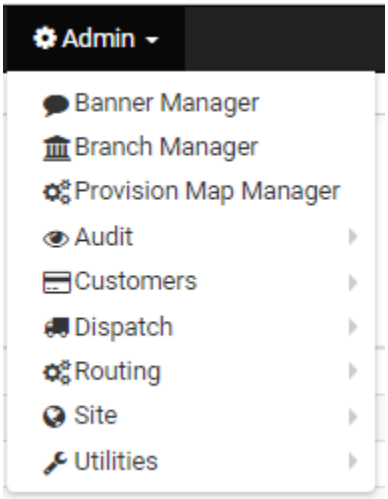


Figure 69—Admin Tab

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.

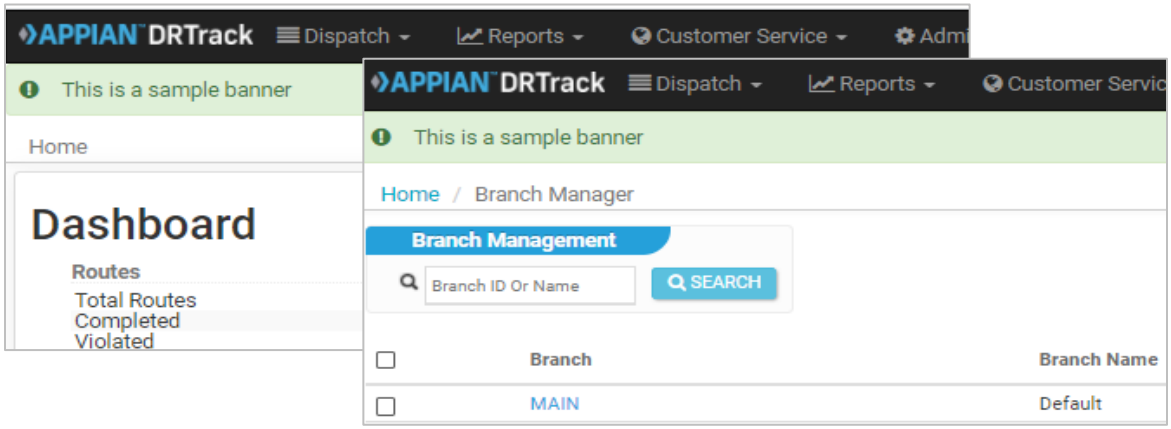


Figure 70—Message Banner

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.

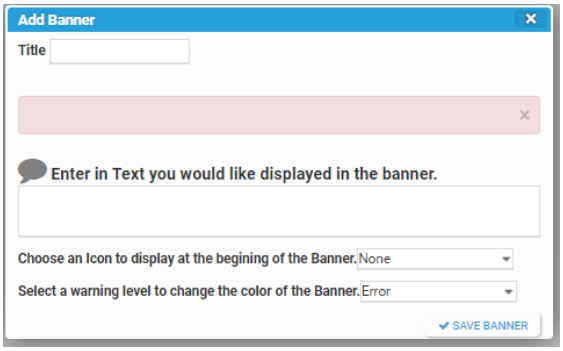


Figure 71—Banner Options

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*.

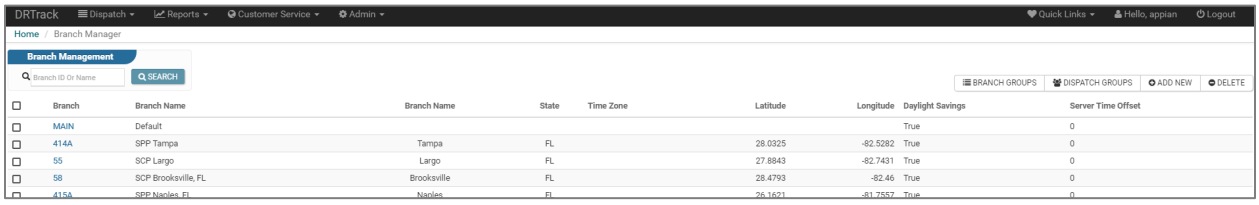


Figure 72—Branch Set Up

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*

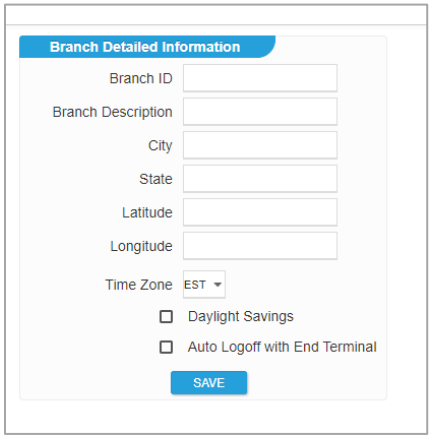


Figure 73—Add New Branch

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.

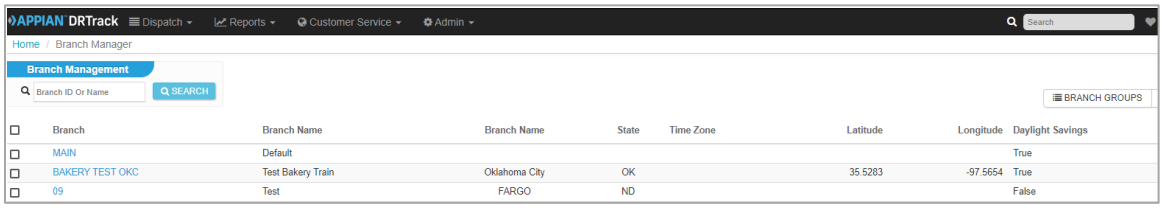


Figure 74—Create a Branch Group

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

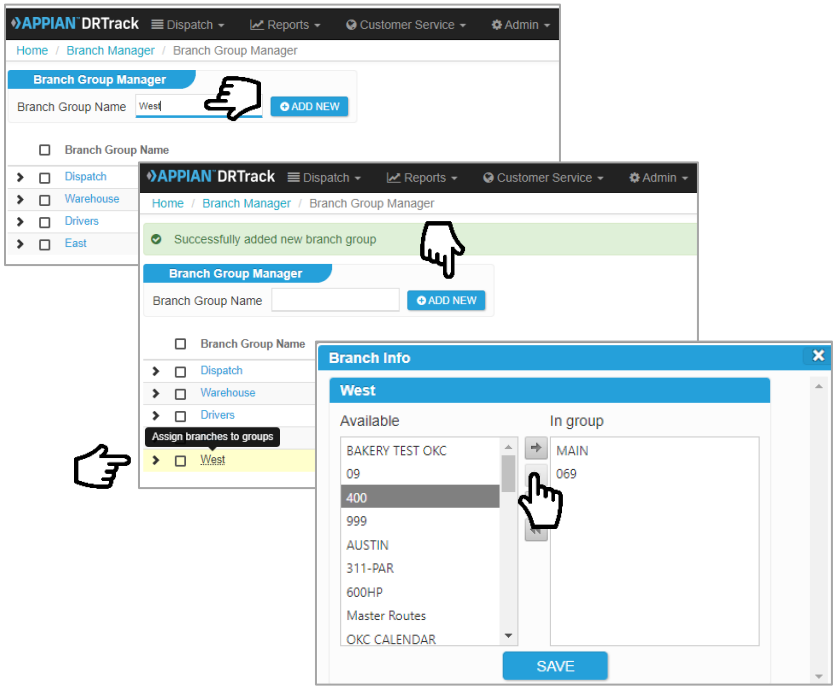


Figure 75—Branch Groups

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 extreme 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.

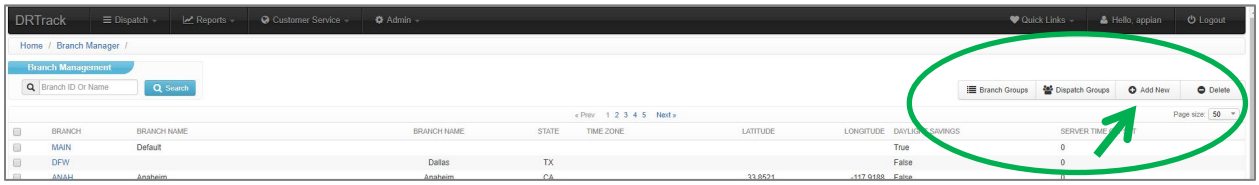


Figure 76—Add New Dispatch Group 1

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

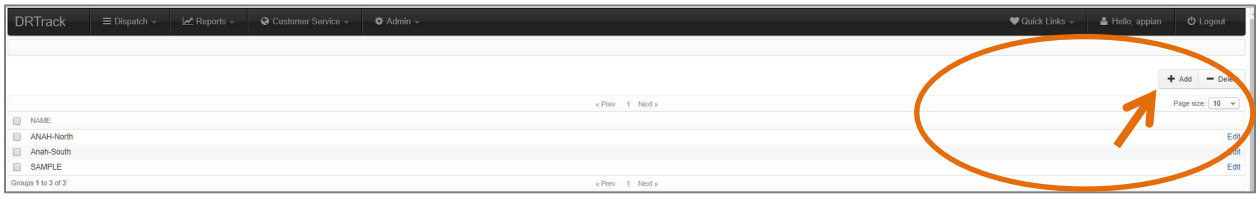


Figure 77—Add New Dispatch Group 2

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.

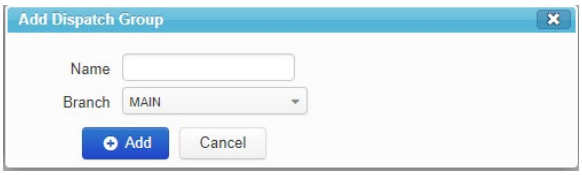


Figure 78—Dispatch Group Name

(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.

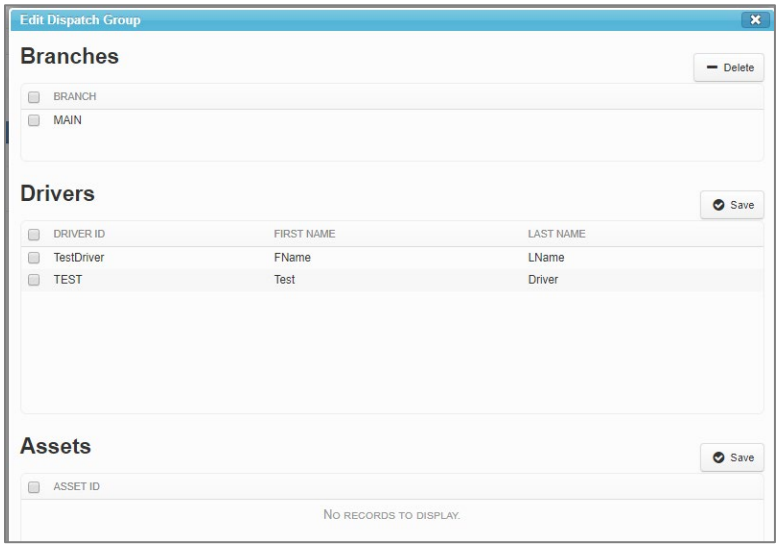


Figure 79—Edit Dispatch Group

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

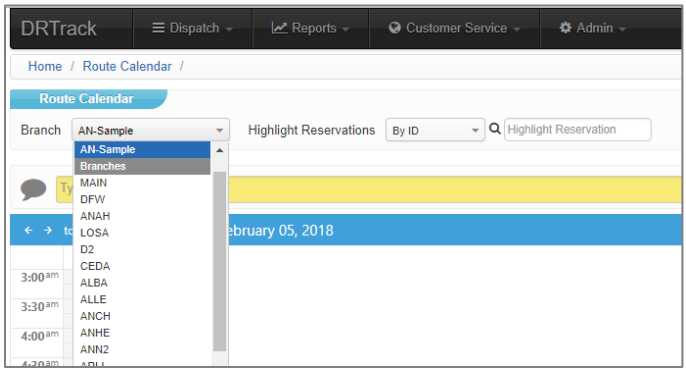


Figure 80—Edit Dispatch Group

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.

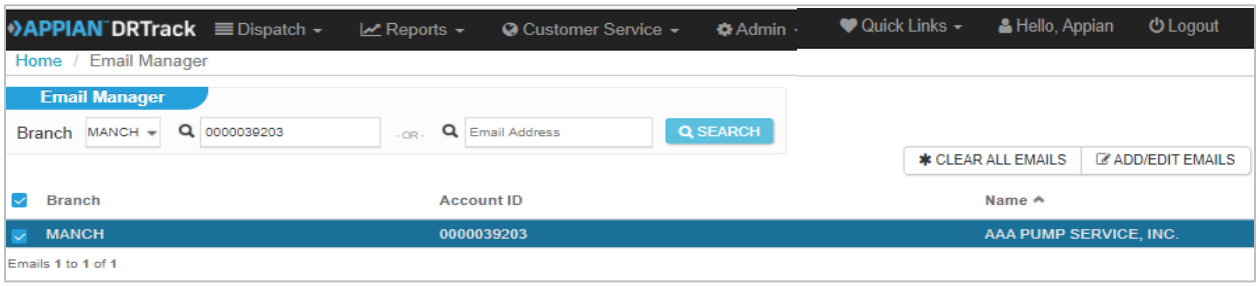


Figure 81—Add/Edit Email Address

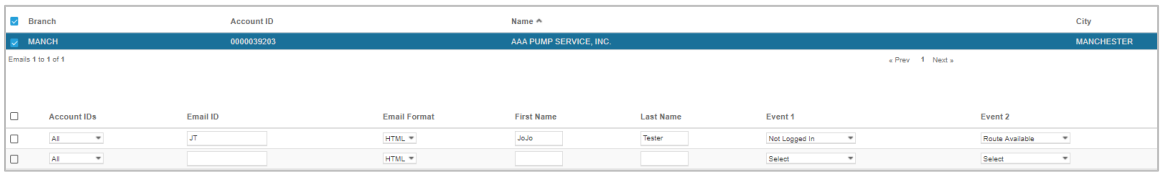


Figure 82—Add/Edit Email Address

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 83—Clear All Emails and Events

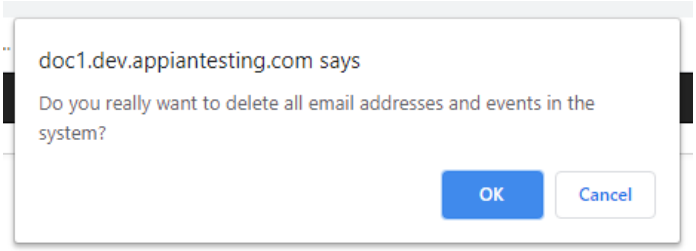


Figure 84—Confirm Clear Email Action

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 85—Audit Activity

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

Figure 86—Account Audit

Figure 87—Appointment Audit

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

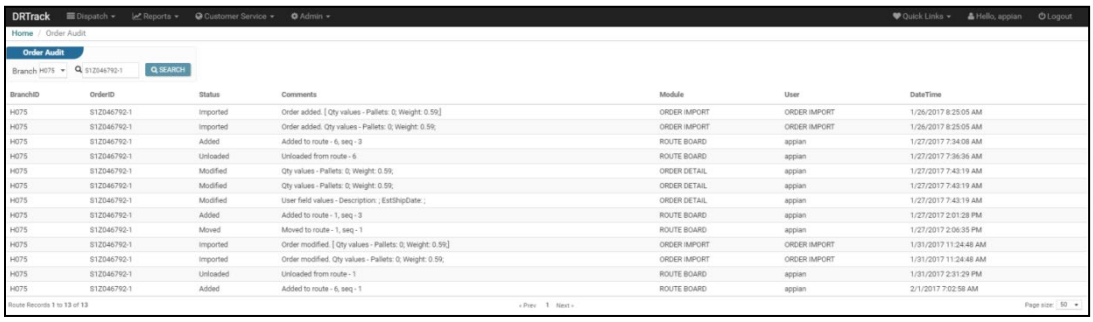


Figure 88—Order Audit

Figure 89—Route Audit

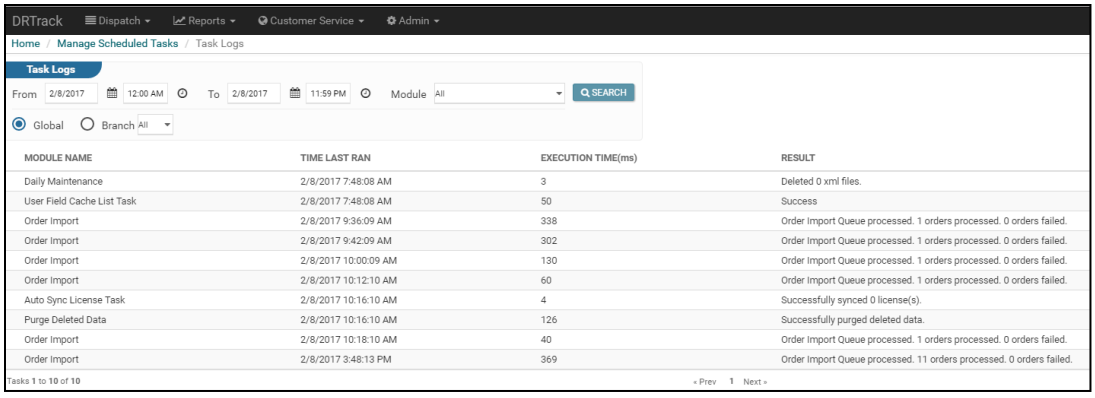


Figure 90—Task Audit

Customers

Customers provides 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

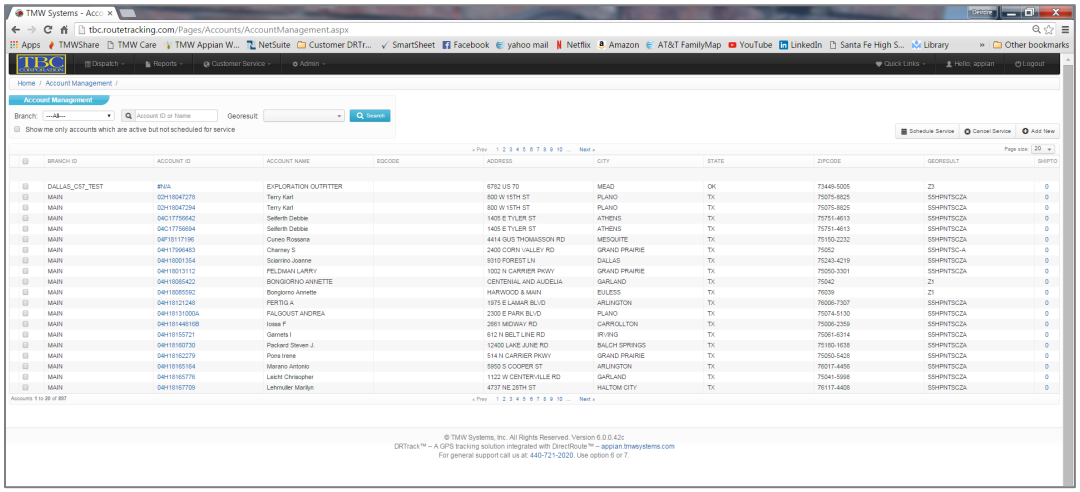


Figure 91—Account Management

Add/Terminate Account

It might be necessary from time to time to add a new acount 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.

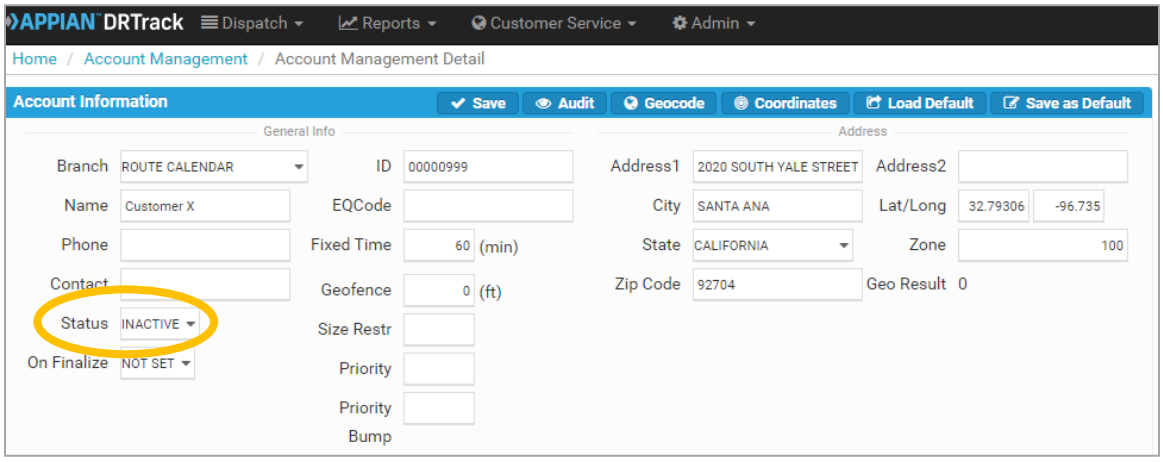


Figure 92—Account Status

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.

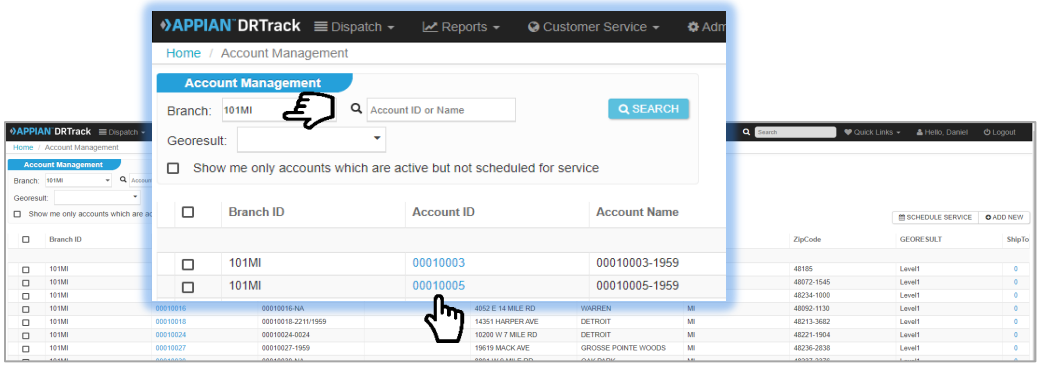


Figure 93—Account Management

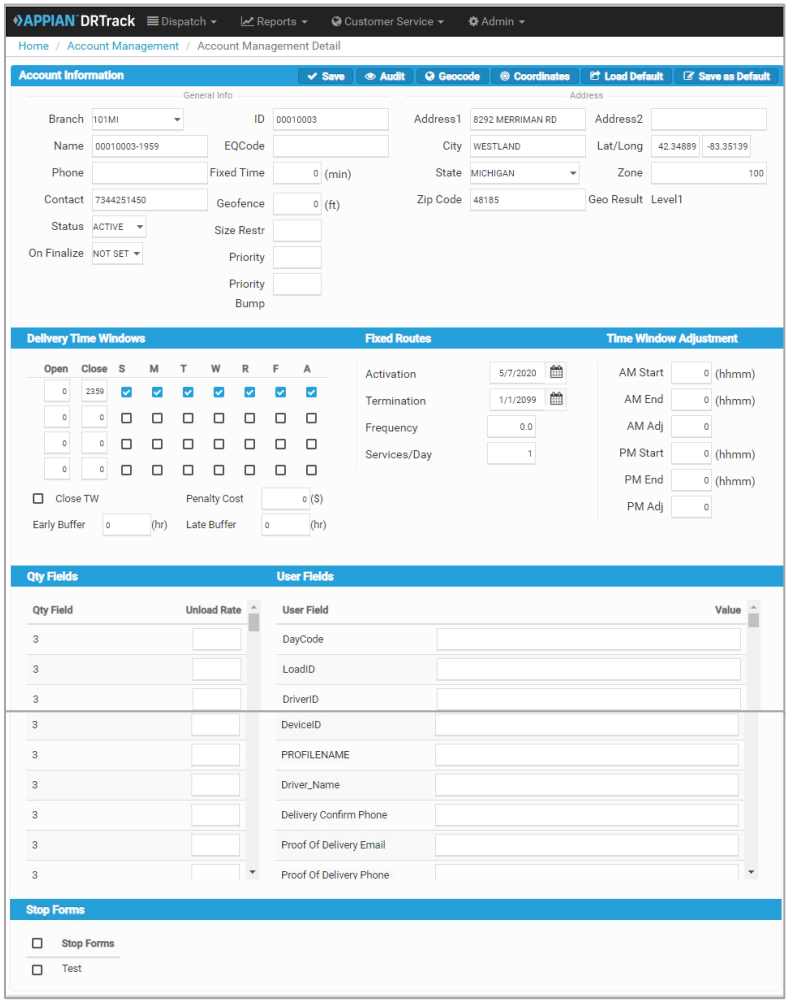


Figure 94—Account Details

DOWNLOAD ACCOUNT MASTER (DIRECTROUTE)

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

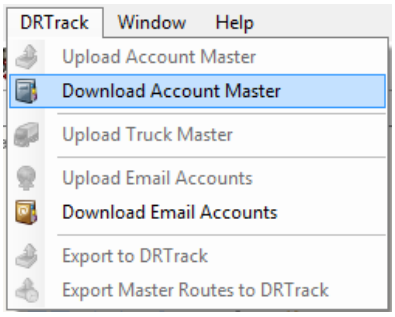


Figure 95—Download Account Master

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*

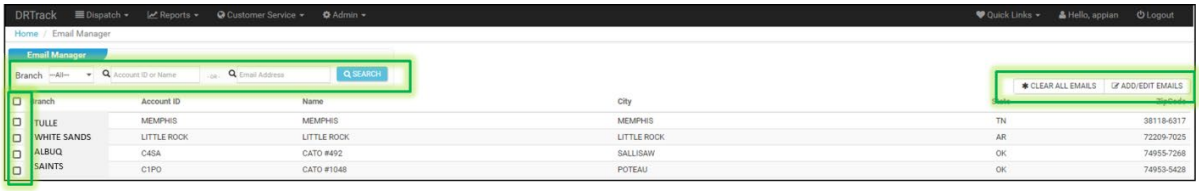


Figure 96—Add/Edit Emails

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

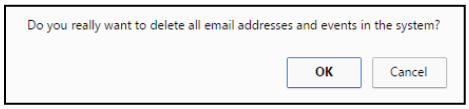


Figure 97—Clear All Emails

   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

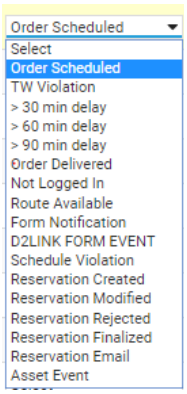


Figure 98—Email Event Notification

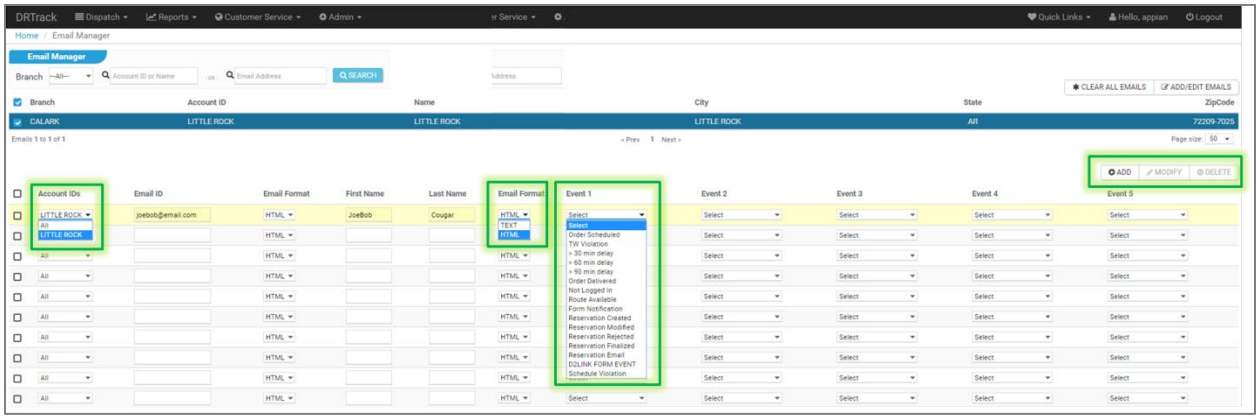


Figure 99—Edit Email Recipient

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

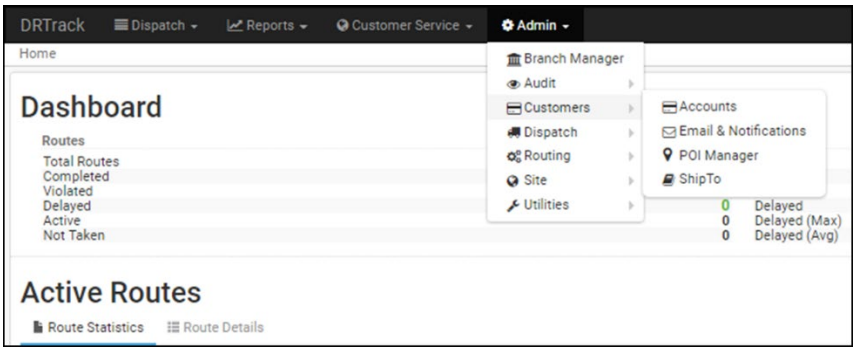


Figure 100—POI Manager

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

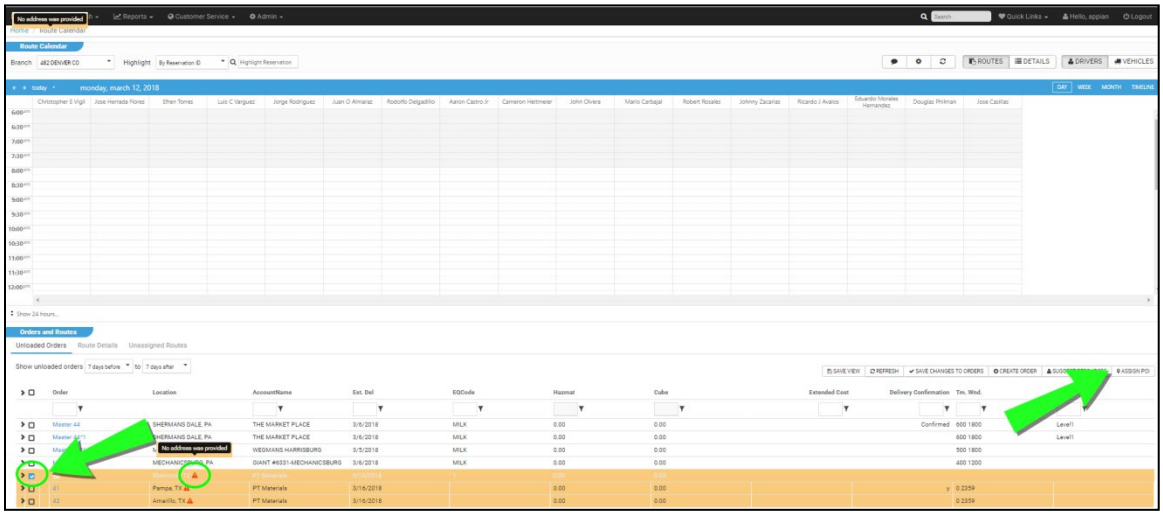


Figure 101—Assign POI from Route Calendar

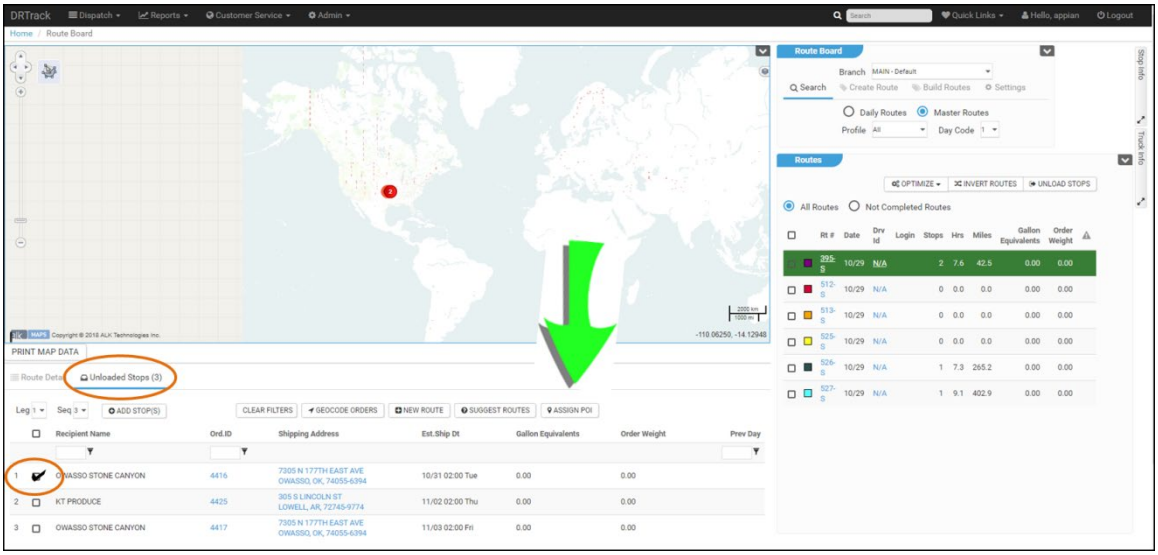


Figure 102—Assign POI from Route Board

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 the *Assign POI* box in the 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".

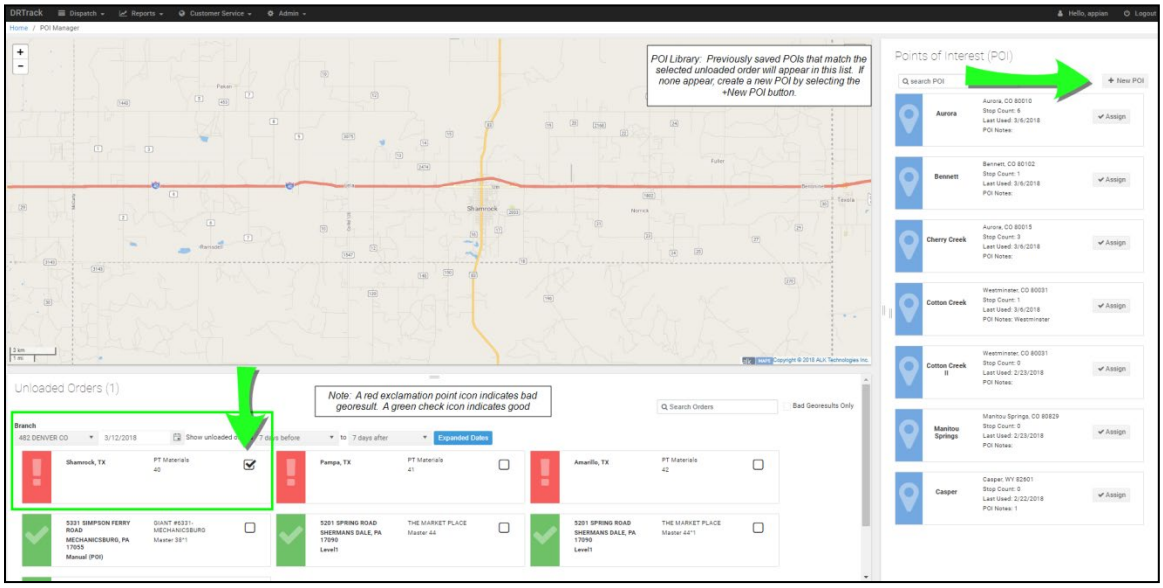


Figure 103—Saved POI Library List

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.
   c. The pin color on the map will change to blue, indicating the POI was selected
   d. 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 104—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

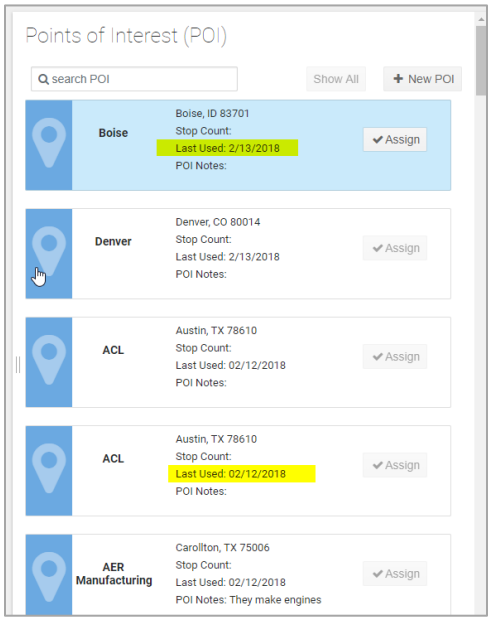


Figure 105—POI Listed in Column

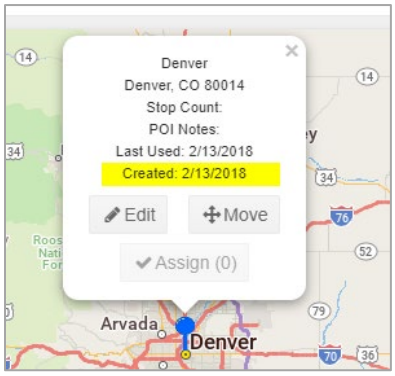


Figure 106—Edit a POI

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

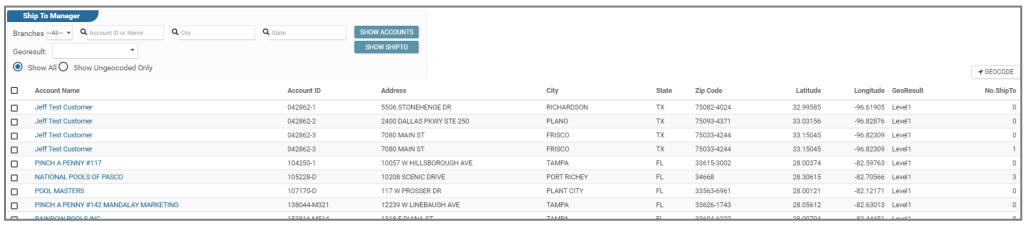


Figure 107—Show Accounts/ShipTo

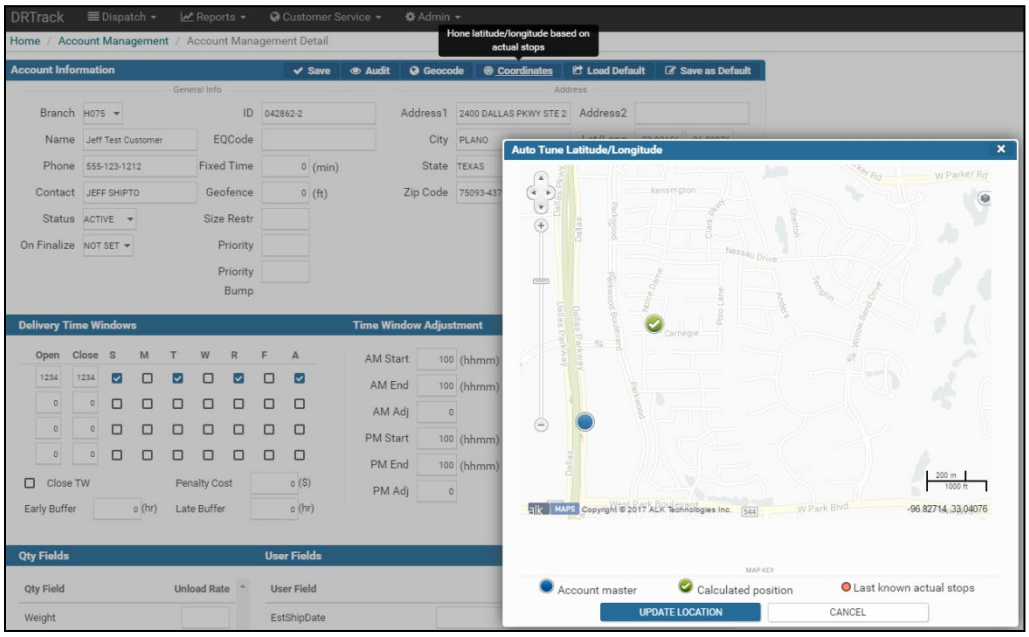


Figure 108—Account Coordinates

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*

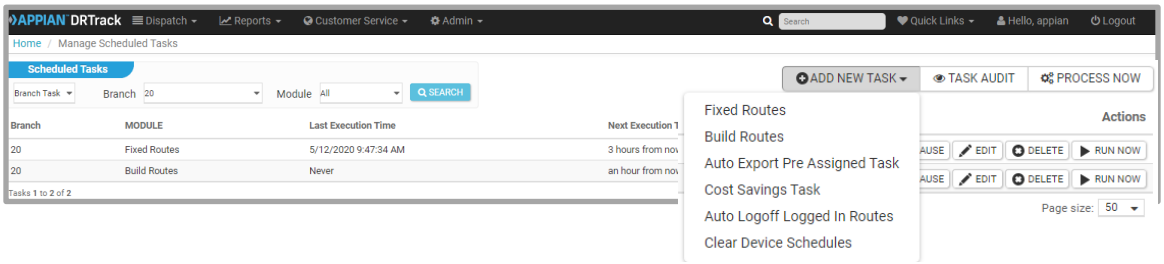


Figure 109—Add Fixed Routes

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

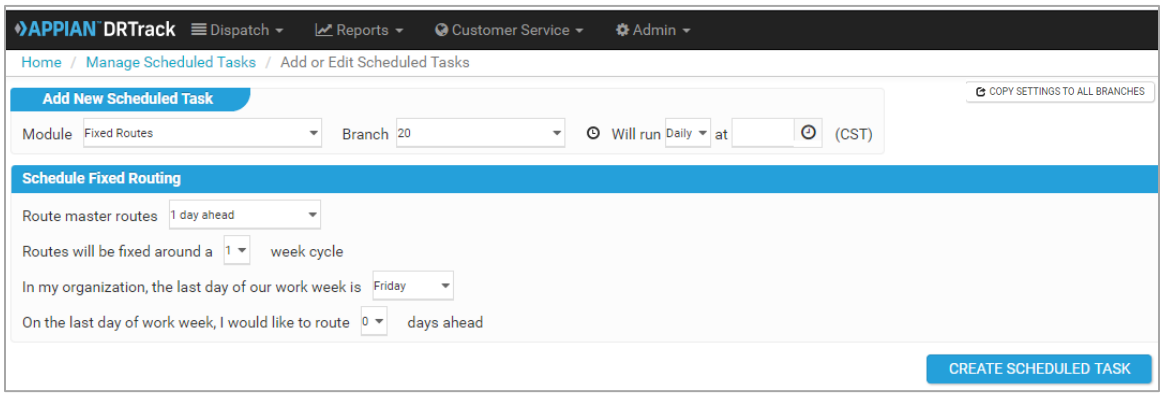


Figure 110—Create Scheduled Task

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.

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 corner
3. Select 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

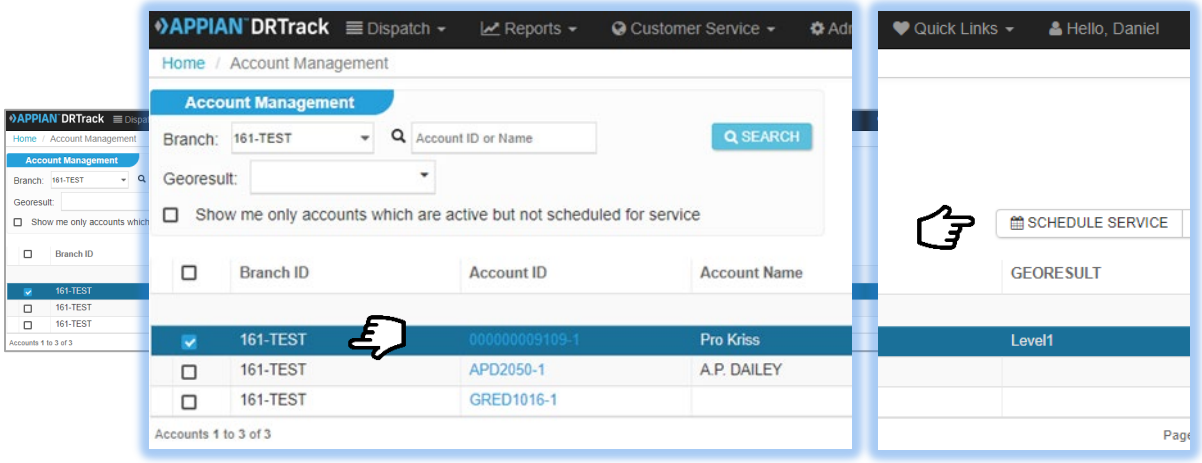


Figure 111—Account Management/Schedule Service

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

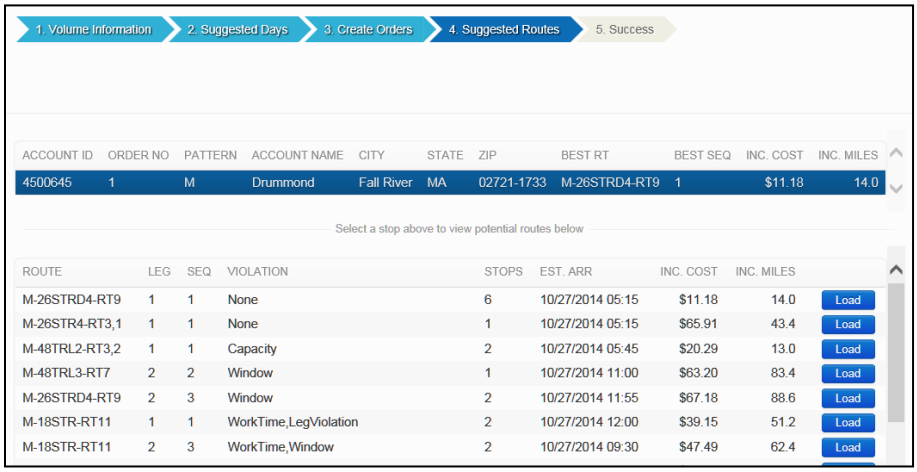


Figure 112—Load Order on Route

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.

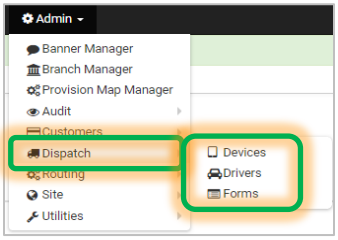


Figure 113—Dispatch Tab

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.*

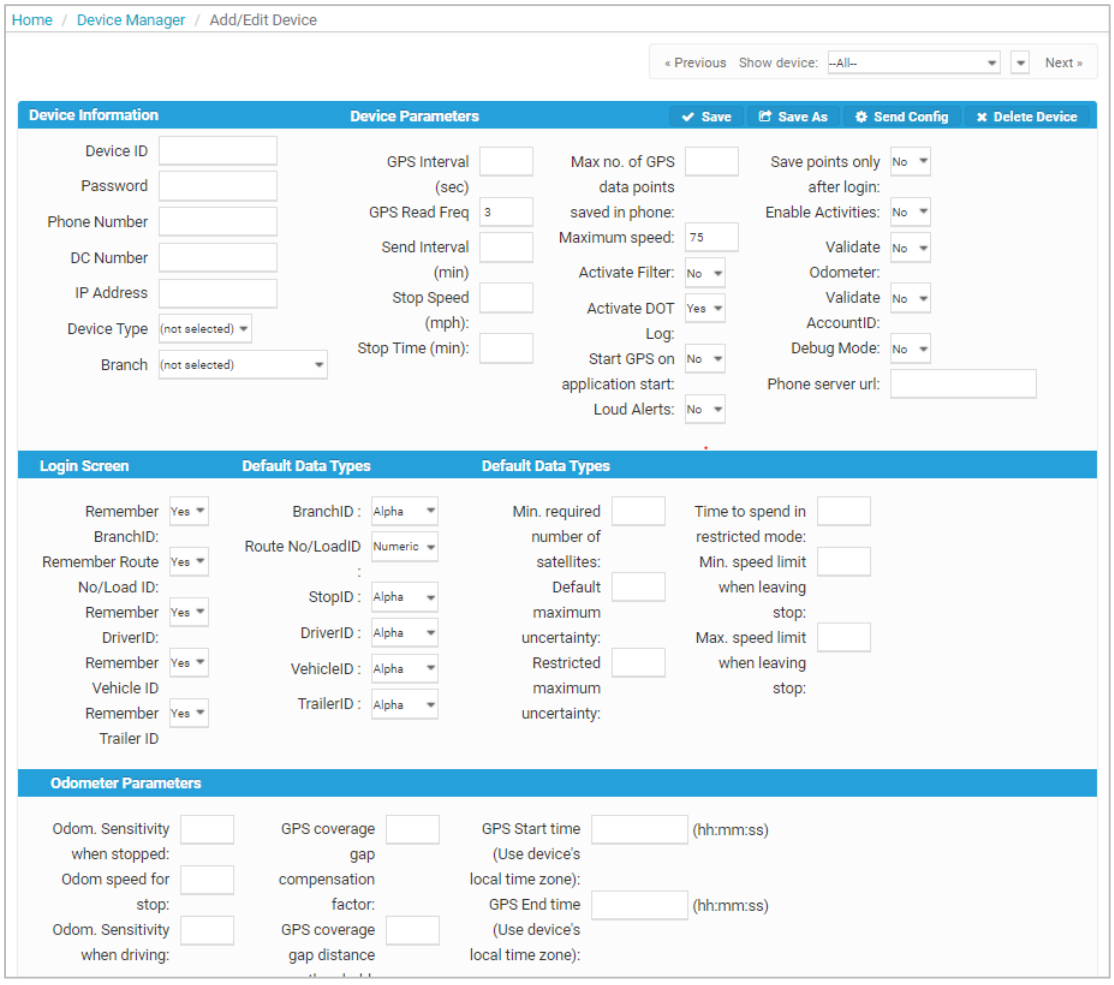


Figure 114—Figure 115—Device Management

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.*

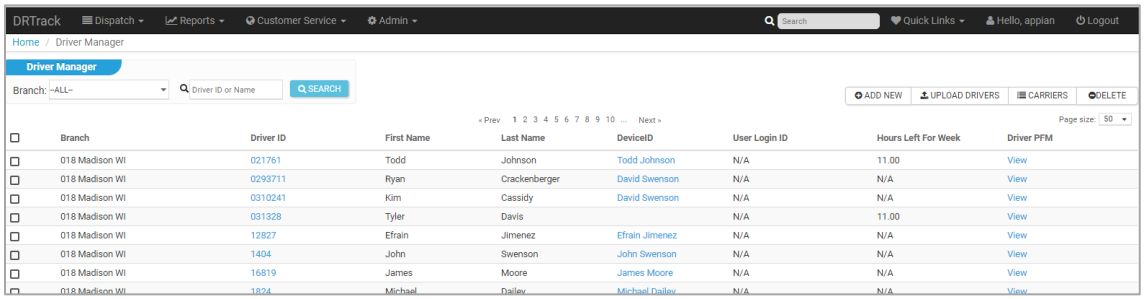


Figure 116—Driver Management

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.

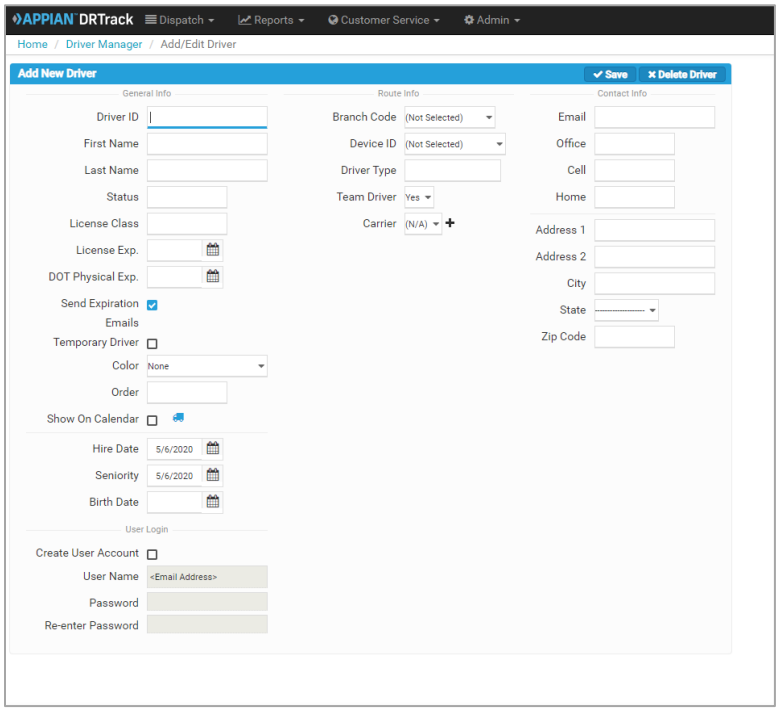


Figure 117—Add New Driver

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.

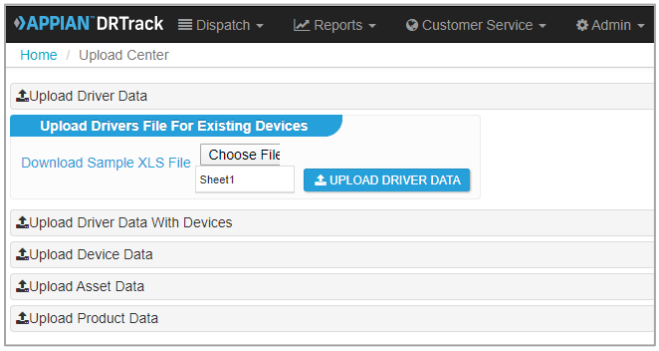
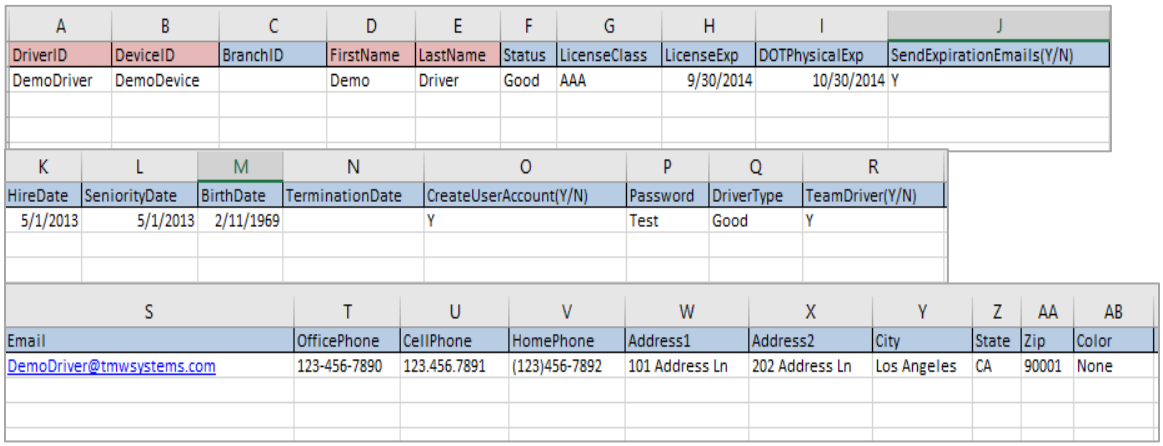


Figure 118—Upload Drivers

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



DriverID	DeviceID	BranchID	FirstName	LastName	Status	LicenseClass	LicenseExp	DOTPhysicalExp	SendExpirationEmails(Y/N)
DemoDriver	DemoDevice		Demo	Driver	Good	AAA	9/30/2014	10/30/2014	Y

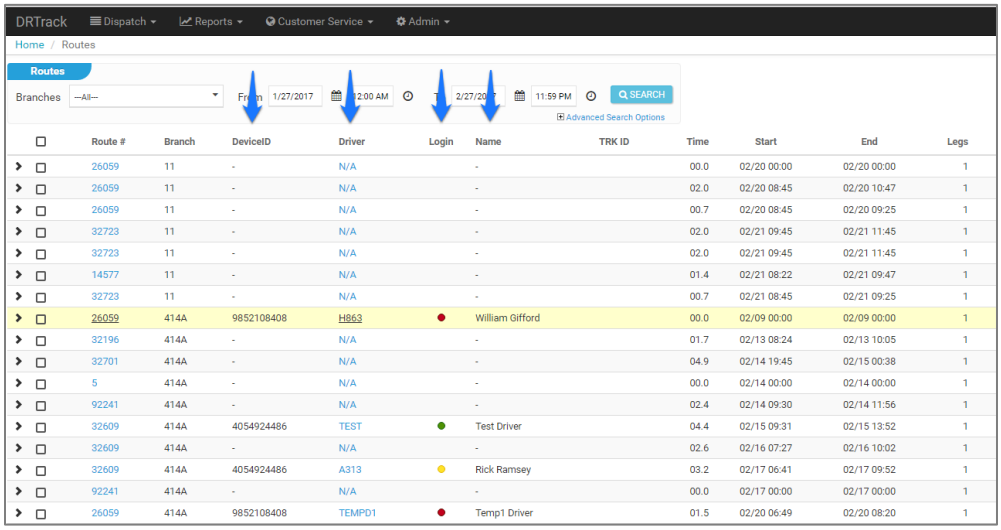
HireDate	SeniorityDate	BirthDate	TerminationDate	CreateUserAccount(Y/N)	Password	DriverType	TeamDriver(Y/N)
5/1/2013	5/1/2013	2/11/1969		Y	Test	Good	Y

Email	OfficePhone	CellPhone	HomePhone	Address1	Address2	City	State	Zip	Color
DemoDriver@tmwsystems.com	123-456-7890	123.456.7891	(123)456-7892	101 Address Ln	202 Address Ln	Los Angeles	CA	90001	None

Figure 119—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.



Route #	Branch	DeviceID	Driver	Login	Name	TRK ID	Time	Start	End	Legs
26059	11	-	N/A		-		00.0	02/20 00:00	02/20 00:00	1
26059	11	-	N/A		-		02.0	02/20 08:45	02/20 10:47	1
26059	11	-	N/A		-		00.7	02/20 08:45	02/20 09:25	1
32723	11	-	N/A		-		02.0	02/21 09:45	02/21 11:45	1
32723	11	-	N/A		-		02.0	02/21 09:45	02/21 11:45	1
14577	11	-	N/A		-		01.4	02/21 08:22	02/21 09:47	1
32723	11	-	N/A		-		00.7	02/21 08:45	02/21 09:25	1
26059	414A	9852108408	H863		William Gifford		00.0	02/09 00:00	02/09 00:00	1
32196	414A	-	N/A		-		01.7	02/13 08:24	02/13 10:05	1
32701	414A	-	N/A		-		04.9	02/14 19:45	02/15 00:38	1
5	414A	-	N/A		-		00.0	02/14 00:00	02/14 00:00	1
92241	414A	-	N/A		-		02.4	02/14 09:30	02/14 11:56	1
32609	414A	4054924486	TEST		Test Driver		04.4	02/15 09:31	02/15 13:52	1
32609	414A	-	N/A		-		02.6	02/16 07:27	02/16 10:02	1
32609	414A	4054924486	A313		Rick Ramsey		03.2	02/17 06:41	02/17 09:52	1
92241	414A	-	N/A		-		00.0	02/17 00:00	02/17 00:00	1
26059	414A	9852108408	TEMPD1		Temp1 Driver		01.5	02/20 06:49	02/20 08:20	1

Figure 120—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.

Locate and select the desired route using the Branch, Date and Route Number search boxes
Use the *DriverID* drop down menu list to select a driver
Use the *DeviceID* drop down menu list to select an associated device
Edit the date and time under the *Login Time* column

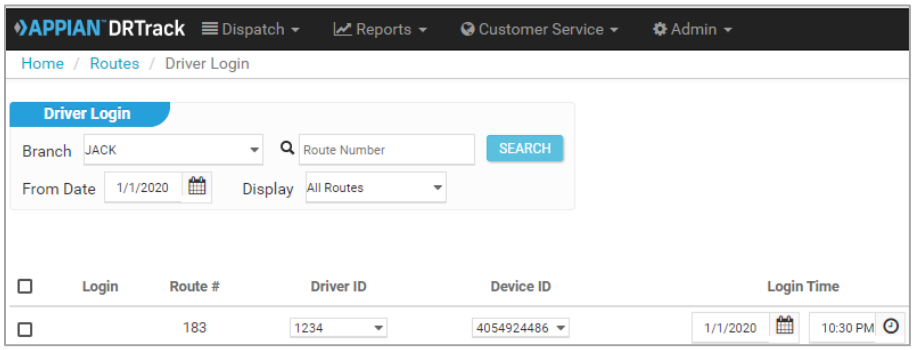


Figure 121—Pre-Assign Driver to Route

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

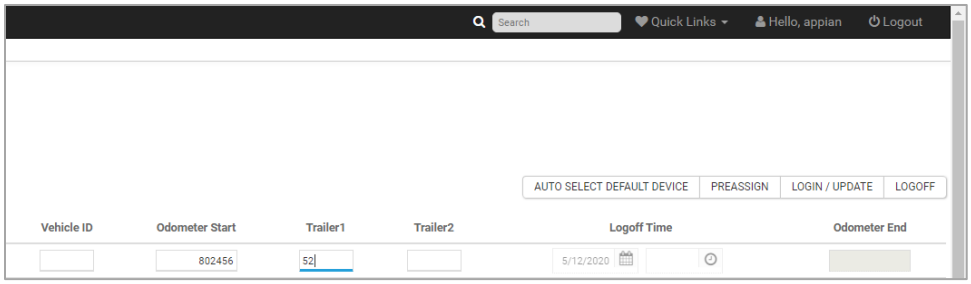


Figure 122—Pre-Assign Driver

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

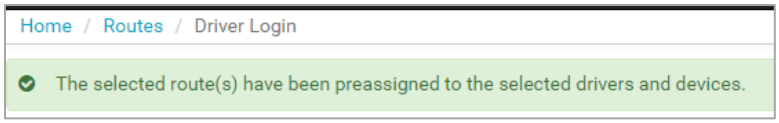


Figure 123—Driver Pre-Assigned to Route

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.

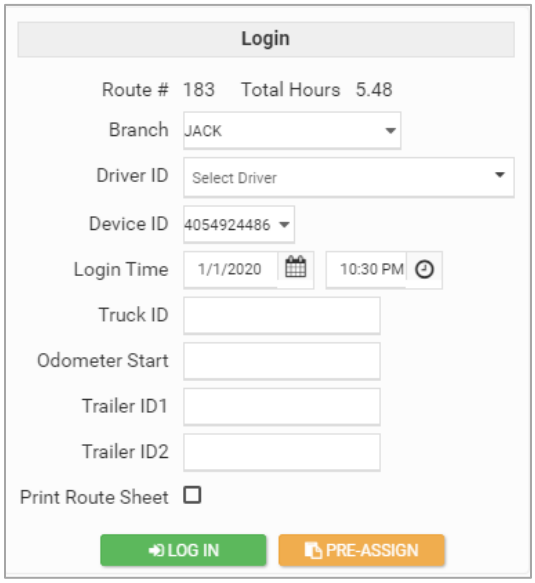


Figure 124—Manual Driver Login

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 125—Add Driver Break to Truck Profile

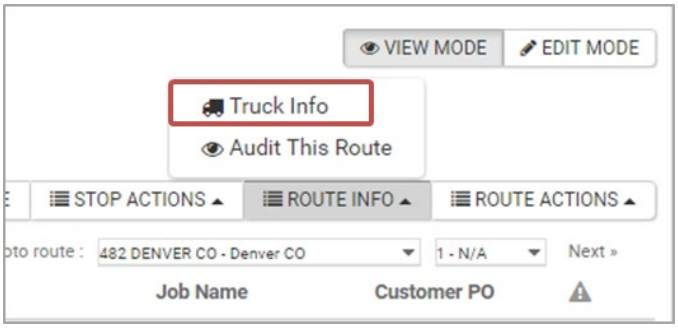


Figure 126—Truck Info

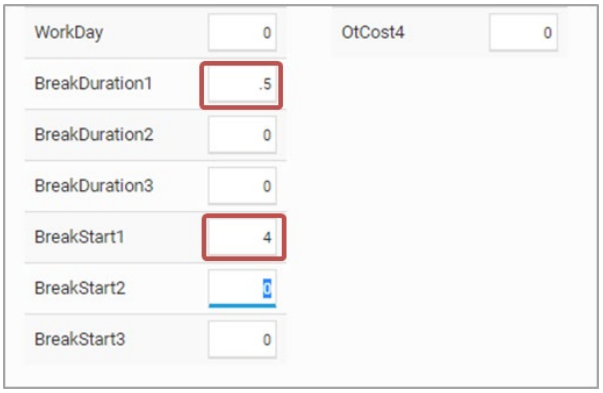


Figure 127—Break Duration, Break Start

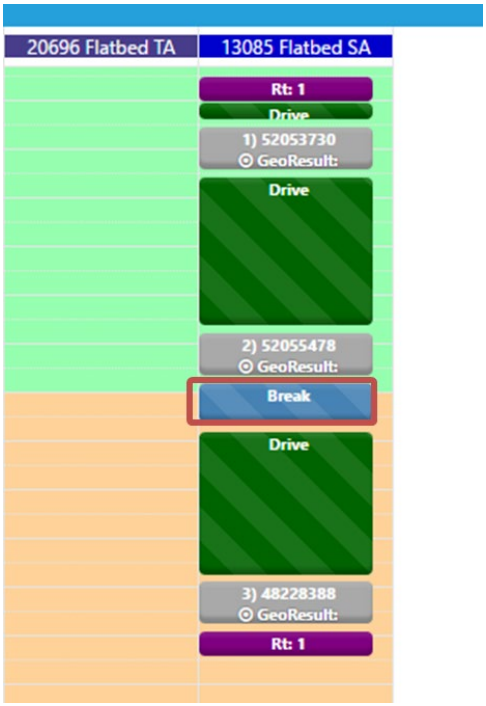


Figure 128—Route with Break Scheduled

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

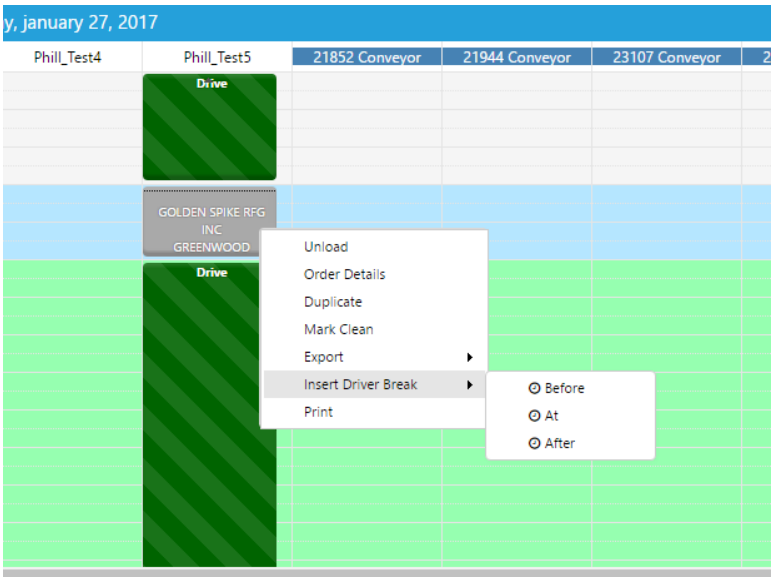


Figure 129—Add Driver Break on the Calendar

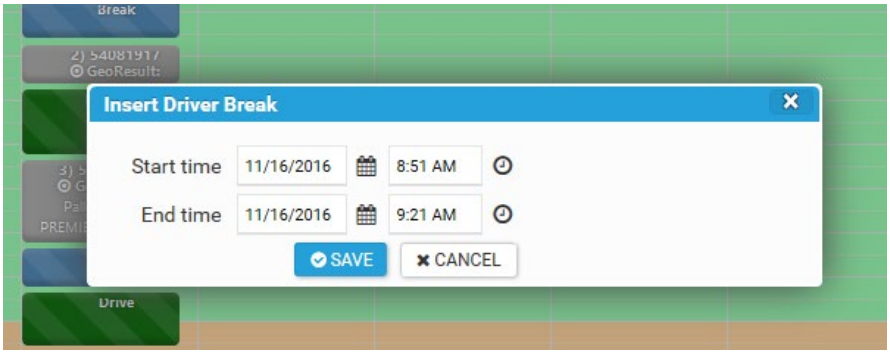


Figure 130—Add Driver Break at Specific Time

***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

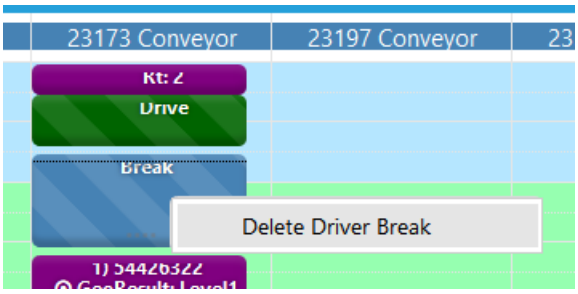


Figure 131—Delete Driver Break

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 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.).

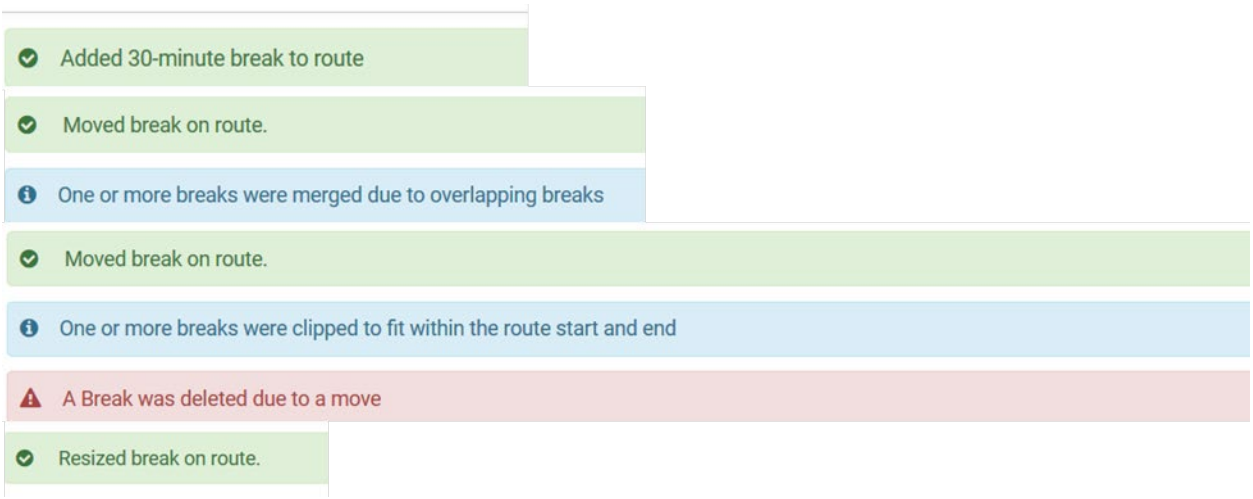


Figure 132—Break Status Messages

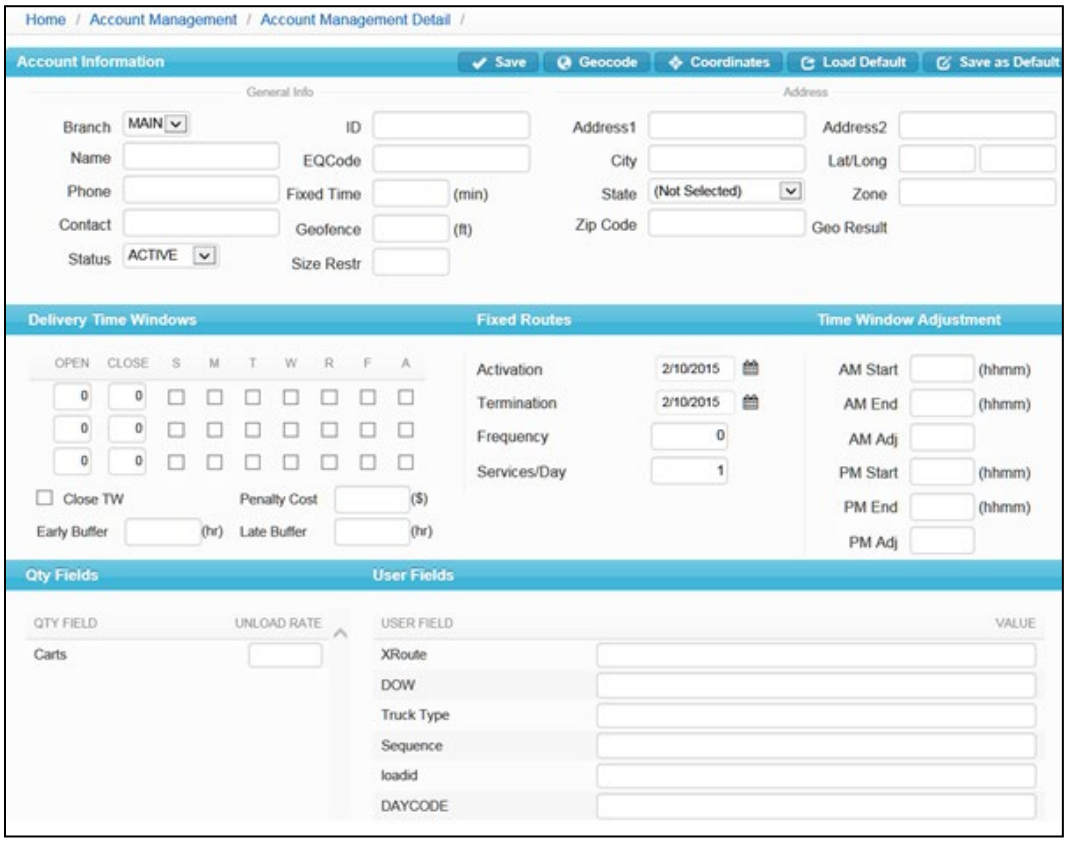


Figure 133—Add New Account

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

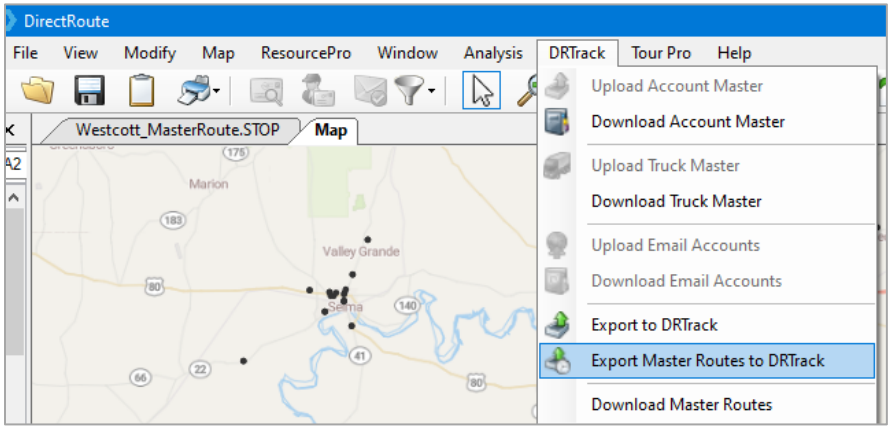


Figure 134—Export Master Routes from DirectRoute

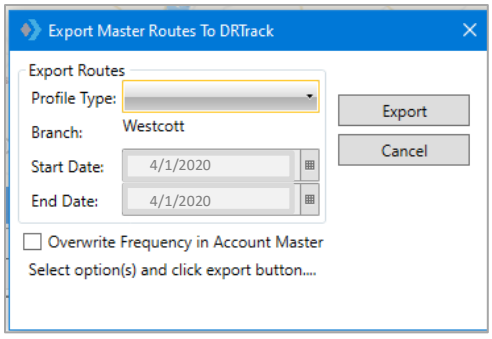


Figure 135—Export Master Routes to DRTrack

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

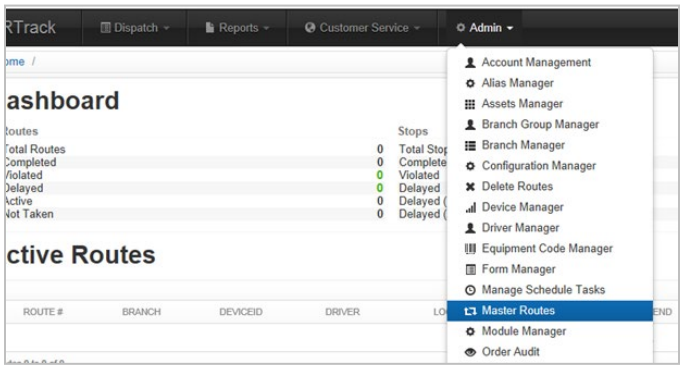


Figure 136—Admin/Master Routes

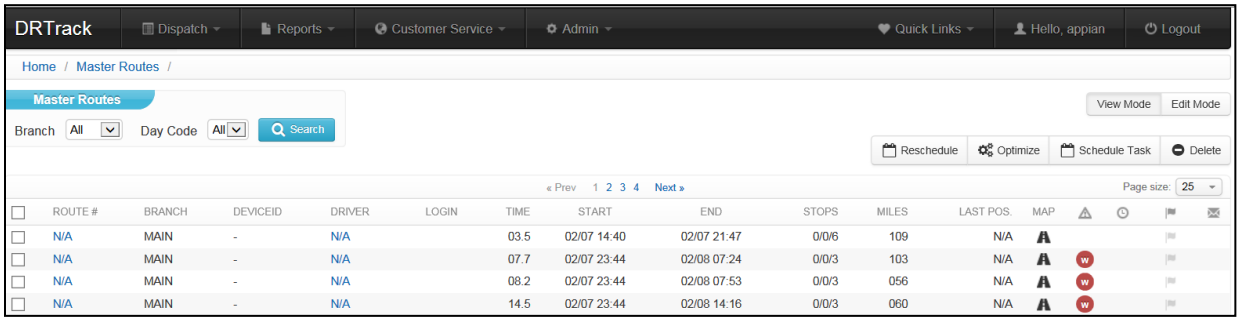


Figure 137—Master Routes Summary Page

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*

Locate the desired Route by using the Branch and Day code selection options. From the list of eligible routes, select the desired route to view all stops assigned to the route.

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

a. To edit *Arrival/Departure*, click on the *Edit Mode* button provided in the top right corner of the screen and insert the new date/times in the appropriate boxes; to exit the edit mode and close the boxes, click on the *View Mode* button

2. Use view or edit orders from the *Order Management* page (*Customer Service > Order Management)*
   a. Locate the stop and click on the *OrderID* to open the order summary
   b. Edit the order details, save, and move to the next stop record to edit additional stops

7. 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
   a. Edit the order details, save, and move to the next stop record to edit additional stops

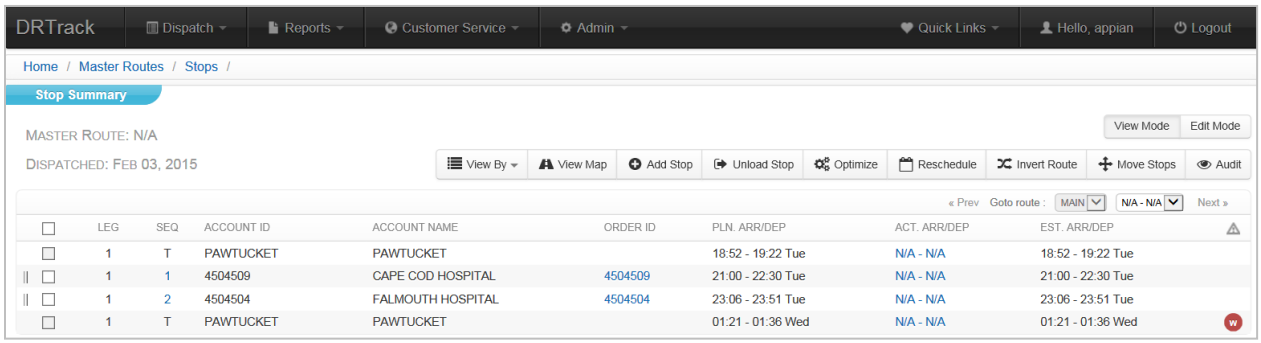


Figure 138—Modify Stops

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

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

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

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

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

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.

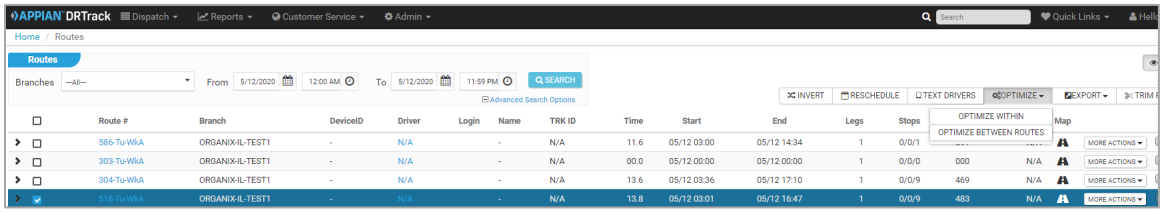


Figure 139—Optimize Routes

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.*

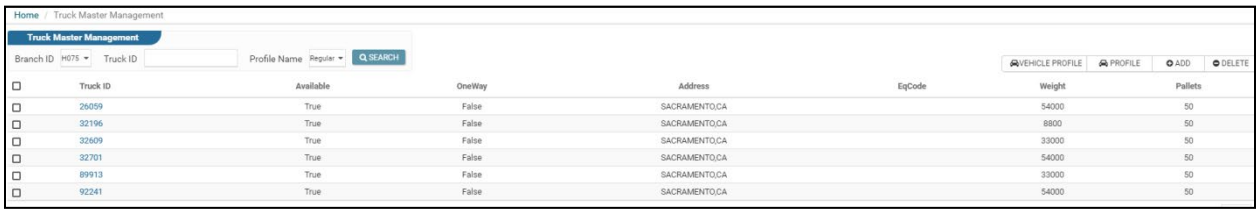
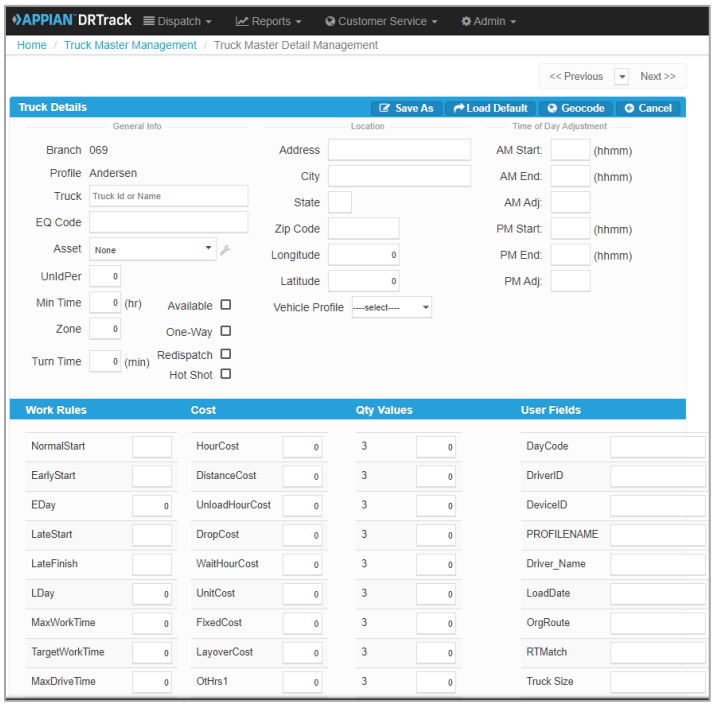


Figure 140—Truck Master Management

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 141—Truck Master Details (Page 1)

Site

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

Utilities

Cost Savings Statistics

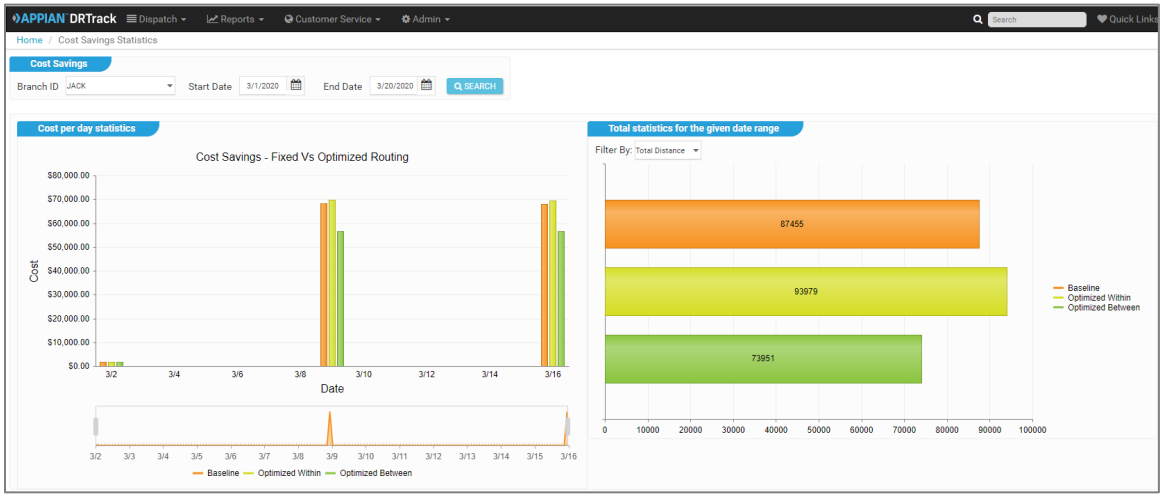


Figure 142—Cost Savings Statistics

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).

```
<RouteResponse xmlns:xsi="http://www.w3.org/2001/XMLSchema-i
  <DispatchDate>2014-06-16</DispatchDate>
  <Version>5</Version>
  <TruckProfileName>Copy</TruckProfileName>
  <BranchID>Downey</BranchID>
  <DRTrackPreferences>
    <OverWriteExistingRoutes>true</OverWriteExistingRoutes>
    <NoOfWeeksCloned>0</NoOfWeeksCloned>
    <UpdateAccountMaster>false</UpdateAccountMaster>
    <FinalizeRoutes>false</FinalizeRoutes>
  </DRTrackPreferences>
  <DRSolutionSummaryStatistics>
    <Statistics>
      <Days>22</Days>
      <Dist>2017.88</Dist>
      <DropCost>0</DropCost>
      <DrvTime>PT75H11M43S</DrvTime>
      <ElapsedTime>PT108H51M23S</ElapsedTime>
      <EndTime>2014-06-16T23:56:50</EndTime>
      <FarthestStopDistance>143.5732</FarthestStopDistance>
      <FixedCost>0</FixedCost>
      <HrCost>2292.91</HrCost>
      <IncrementalCost>0</IncrementalCost>
```

Example .*XML* Upload File

Rt4 RTUPLOAD .UPL - Notepad

File Edit Format View Help

```
We4  1  005329        L08020-00      0927 0942 P69
We4  2  006739        L08007-00      0948 0948 P69
We4  2  006739        L08006-00      0948 1013 P69
We4  3  005134        L08054-00      1048 1110 P69
We4  4  006753        L08097-00      1133 1141 P69
We4  5  005129        L07257-00      1300 1340 P69
We4  6  101870        257292         1353 1431 P69
We4  7  102768        257420         1450 1620 P69
We4  8  101523        257268         1644 1704 P69
```

Example .*UPL* Upload File

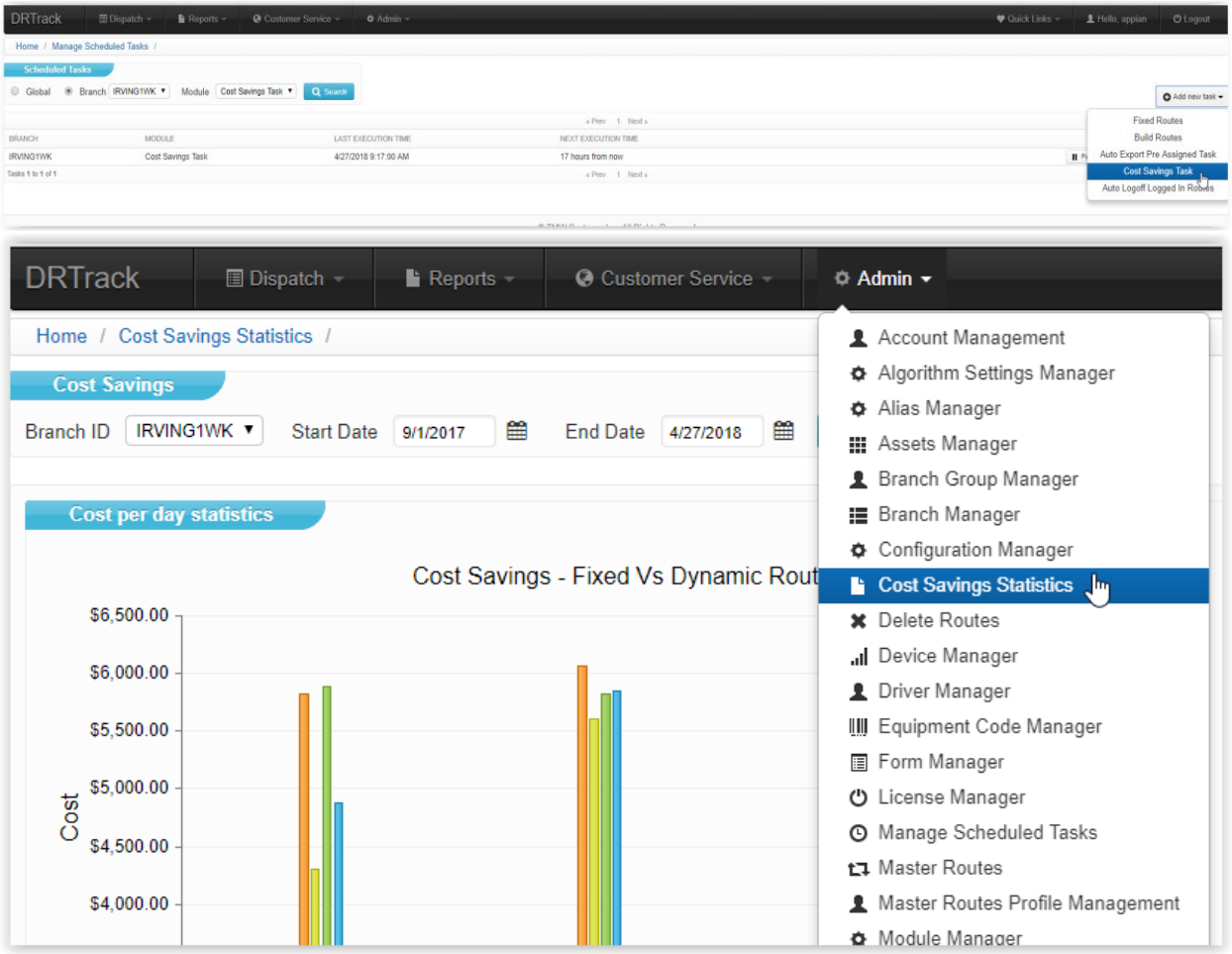
Figure 143—Upload File

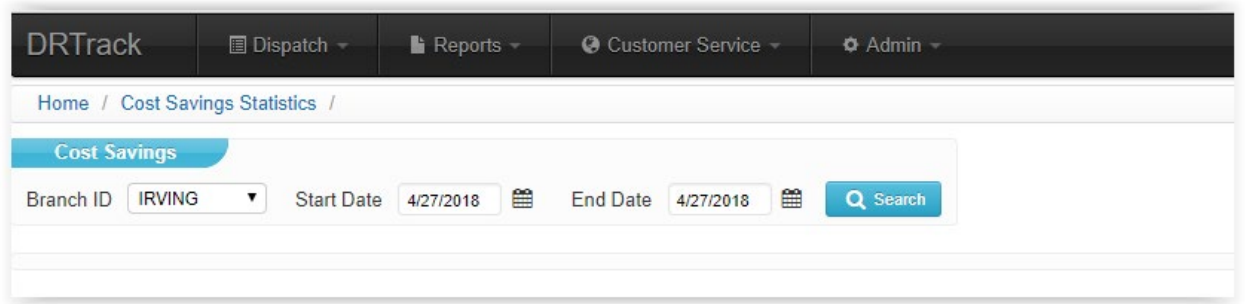
Cost Savings Scenario Tool

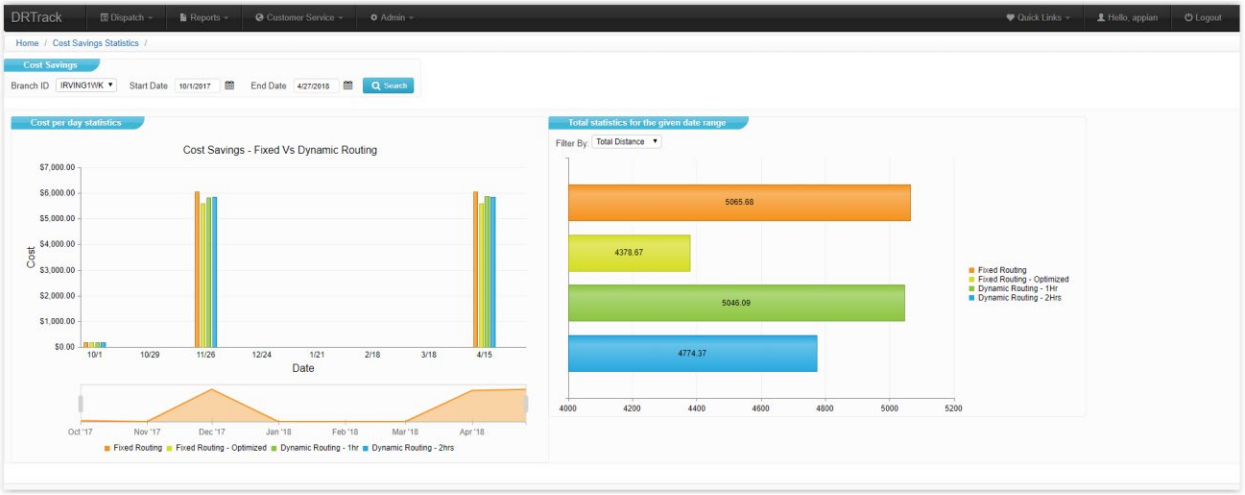
The Cost Savings Scenario Tool provides statistics for a given date range, and offers filtering options such as Optimized Within and Optimized Between Routes.

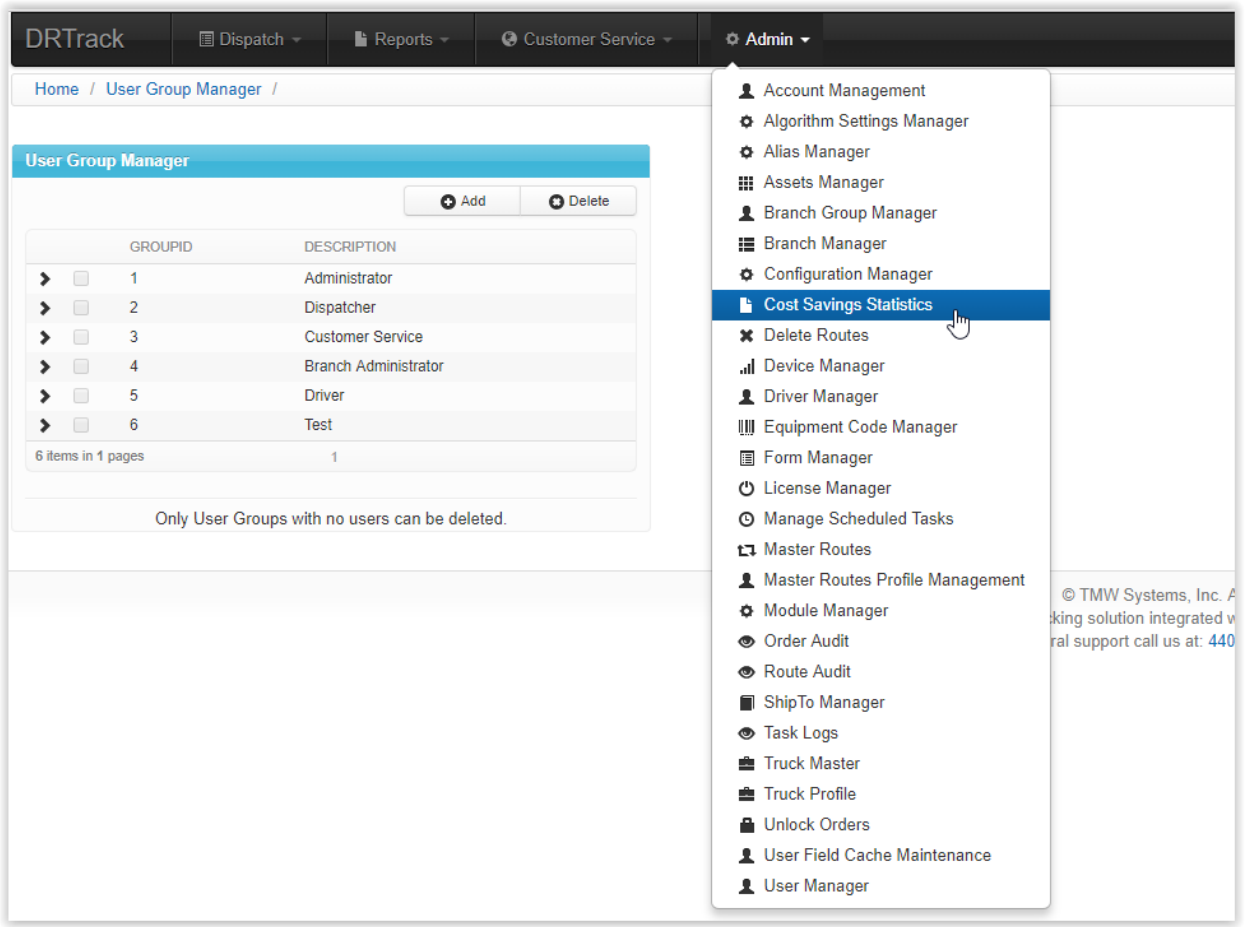
1. Navigate to *Admin→ Manage Scheduled Tasks*
   e. Select a branch from the drop-down menu
2. Select *Add New Task→Cost Savings Task*

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




DRTrack
Dispatch
Reports
Customer Service
Admin
Home / Cost Savings Statistics /
Cost Savings
Branch ID
IRVING
Start Date
4/27/2018
End Date
4/27/2018
Search


Cost Savings - Fixed Vs Dynamic Routing
Cost
Date
Total statistics for the given date range
Filter By:
Total Distance
5065.68
4378.67
5046.09
4774.37
Fixed Routing
Fixed Routing - Optimized
Dynamic Routing - 1Hr
Dynamic Routing - 2Hrs


DRTrack
Dispatch
Reports
Customer Service
Admin
Home / User Group Manager /
User Group Manager
Add
Delete
GROUPID
DESCRIPTION
1 Administrator
2 Dispatcher
3 Customer Service
4 Branch Administrator
5 Driver
6 Test
6 items in 1 pages
Only User Groups with no users can be deleted.
Account Management
Algorithm Settings Manager
Alias Manager
Assets Manager
Branch Group Manager
Branch Manager
Configuration Manager
Cost Savings Statistics
Delete Routes
Device Manager
Driver Manager
Equipment Code Manager
Form Manager
License Manager
Manage Scheduled Tasks
Master Routes
Master Routes Profile Management
Module Manager
Order Audit
Route Audit
ShipTo Manager
Task Logs
Truck Master
Truck Profile
Unlock Orders
User Field Cache Maintenance
User 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

1	2	3	4	5	6
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 downloded 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 144—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*
  - Process one order at a time
  - Removes special characters (™, ©, ®, …)
  - EQCodes should not be affected

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

- Required Columns
  - ID1 / ID2

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

**Note: There may be users saved in DRTrack that are not in the Okta user store*

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	8z7nls77E1RXdTQ		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 seperated QtyAlias (value from TBLQTYFIELDS.QTYALIAS column). Ex: Cube,Pallets

dotnet	DefaultDisplayQtyAlias	Pallet Qty, Hazmat	Edit	Configuration to display up to two QtyAlias in aspx page. Please enter comma seperated QtyAlias (value from TBLQTYFIELDS.QTYALIAS column). Ex: Cube,Pallets
dotnet	AlgoConsolidateFixedTimes	True (✓) or False	Edit	Consolidates fixed time if set to true
dotnet	AllowInsertingStopsImmediatelyAfterLastCompleted	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	ApplyTimeBoundariesOnRelatedRoutes	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	AutoLoginPreassignedRouteBufferTime	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 seperated 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	AIzaSyCBgOiIsjw 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 seperated 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 teh 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	TimeWindowCodes	Edit	Decides how Shifts are determined in the system. One can either use "Custom" shifts or "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 recieving an order and assigning the time window
dotnet	UseZeroVolumeForCloning	True (✓) or False	Edit	Use zero for quantity volume during cloning process.
DotNet	DefaultEnableConfirmationOnRouteBoard	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	OpenPatternsAndDatesOnOrdersBeforeBuild	True (✓) or False	Edit	Opens order delivery window patterns and earliest/latest date when building routes.
DotNet	ShowGeoresultUnloadedStopsRouteBoard	True (✓) or False	Edit	Shows GeoResult column on Unloaded Stops Grid on Route Board
DotNet	ShowRoutesStopCountOnRouteBoard	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. Options 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,Level1,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	OverwriteAccountEQCodeWithin 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	UPDATEACCOUNTLATLONGINOMM	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 fiedl 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

				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	DoNotUseTransactionsDuringRouteUpload	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

				terminal without triggering auto-logoff even if other minimums have not been met.
stopdetection	MatchStopListWithLegAndSeqOnly	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	MinPercentageRequiredForAuto Logoff		Edit	Minimum percentage of route completion required before AutoLogoff can be triggered.
stopdetection	MinRequiredDurationForAutoLogoff	30	Edit	Minimum number of minutes that the vehicle is at the terminal before auto logoff can engage.
stopdetection	MinStopsRequiredForAutoLogoff		Edit	Minimum number of actual stops that must be detected for AutoLogoff to be triggered.
stopdetection	UtilizeGPSTrailWithFormBasedArrival Departure	True (✓) or False	Edit	Determine whether to use historical GPS data to help buffer form arrival/departure in addition to fixed time.
StopDetection	DetectZeroMinStopsAtPlnStopLoc	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 seperate thread.
StopDetection	StopDetectionDuration	15	Edit	Determines the minimum duration required to consider a series of points as a stop.
StopDetection	StopDetectionDurationNrPlnStop	10	Edit	Overrides StopDetectionDuration for points within a planned stop geofence.
StopDetection	StopDetectionDurationNrTerm	3	Edit	Overrides StopDetectionDuration for points within a terminal geofence.

StopDetection	StopDetectionSpeed	15	Edit	Maximum speed allowed for a point to be considered in stop detection logic.
StopDetection	StopDetectionStopGeofence	1500	Edit	Default geofence for a planned stop location. Can be overridden at Account Master level.
StopDetection	StopDetectionTerminalGeofence	2500	Edit	Default geofence for a planned terminal.
StopDetection	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.
StopDetection	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.
StopDetection	StopMergingDistance	1500	Edit	Determine the maximum allowed distance for two stops to be merged together into one stop.
StopDetection	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:Delivery Confirm Phone}|job={user: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	EnableSaveUserRouteStartTime Changes	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	ShowActualDeliveryQuantitiesIn StopsPage	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	ShowTruckCapValueOnRoute CalendarAppointment	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	CreateNewRouteWhenDraggingStop 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	RouteCalendarDefaultResourceView	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	Sepcify a qty alias that needs to be exported as units to Xata
Xata	Username		Edit	companyname\username
Xata	WeightQtyAlias		Edit	Sepcify 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	Sepcify a user field alias that needs to be exported as product code to XRS
XRS	RootOrganizationID	0	Edit	RootOrganizationID
XRS	UnitQtyAlias		Edit	Sepcify a qty alias that needs to be exported as units to XRS
XRS	UnitQtyTypeAlias		Edit	Sepcify a user field alias that needs to be exported as unit type to XRS
XRS	Username	VSawyer	Edit	companyname\username
XRS	WeightQtyAlias		Edit	Sepcify 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**
  - Select search criteria
  - *Finlized Routes* will display the letter "E" in a column in front of the route number
  - Any modification to the route after finalization will trigger ⚠ to appear in front of the "E"
  - ⚠ will also appear in various route detail screens/windows to advise of the route modifications
  - 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**
  - Select search criteria
  - *Exported Routes* will display the 6-digit branch code in front of the original route number (ex. 121-AKR28016-W)
  - Any modification to the route after finalization will trigger ⚠ to appear in front of the "E"
  - *Re-Finalize* & *Re-Export* to PeopleNet to send modified route details to PeopleNet

How to load Unloaded Stops?

- Go to **Dispatch > Routes**
  - Select the branch and date range, then select the *Load Unloaded Orders* button
  - 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)
  - Go back to Dispatch > Routes
  - Select the branch and date range, then select the *Unloaded Stops* tab
  - Select the stop(s) to be loaded, activate the desired route number(s), then indicate the desired sequence(s) and select *Add Stop*, OR
  - 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
  - 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
  - Go to **Dispatch > Routes**
  - Select the branch, then select *Master Route*

  - Select the *Day Code*, the route involved, and the stop sequence of the shipment
  - Select *View Alternates* OR *Unload Stop* to process manually
- On a Different Day (Method A)
  - Go to **Dispatch > Routes**
  - Select the branch, then select *Master Route*
  - Select the *Day Code* and the route involved
  - Expand the shipment and select the *Order ID* hyperlink, then the *Account ID* hyperlink
  - Change the delivery day pattern in the *Delivery Time Window*, then save & close
  - Change *Est Del Date* to a new date (stay within the same week, Sunday to Saturday)
  - Change the *Delivery Day Pattern* to a new day, then save & close
  - Select the stop sequence of the shipment
  - Select *View Alternates* OR *Unload Stop* to process manually
- On a Different Day (Method B)
  - Go to Account Management
  - Select the branch and Account ID
  - Select the Account ID hyperlink and modify the required fields (*Delivery Days* & *Frequency*)
  - Save the changes then return to *Account Management* main screen
  - Select radial box of account
  - Select *Schedule Service* and specify *Master Route Profile* to be adjusted from the drop down menu
  - Select Go to Suggested Days
  - Select Select to Delete existing services for this account
  - Complete the Schedule Service Wizard process
- On Multiple Different Days
  - Go to Account Management
  - Select the branch and Account ID
  - Select the Account ID hyperlink and modify the required fields (*Delivery Days* & *Frequency*)
  - Save the changes then return to *Account Management* main screen
  - Select radial box of account
  - Select *Schedule Service* and specify *Master Route Profile* to be adjusted from the drop down menu
  - Select Go to Suggested Days
  - Select Select to Delete existing services for this account
  - Complete the Schedule Service Wizard process

How do I adjust Capacity Gauge values?

- Method 1
  - Go to **Route Board > Master Routes** and select the Day Code
  - Make active the route to be changed
  - Launch the *Truck Info* tab (right side of screen)
  - Select *Edit* in the *Truck Info* window and the Truck Details box will open
  - Under the *Qty Values* column, update each quantity value
  - Save and reschedule
  - Close additional browser tabs, then refresh the Route Board screen to view new values
  -
- Method 2

- Go to **Admin > Master Routes** and select the branch
- Specify the *Day Code* and select the *Route #* hyperlink, then select the *Route Info* tab
- Select *Truck Info* and under the *Qty Values* column, update each quantity value
- Save and reschedule
- Close additional browser tabs to return to *Master Routes*

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

- Method 1
  - Go to **Route Board > Master Routes** and select the Day Code
  - Make active the route to be changed
  - Launch the *Truck Info* tab on the right side of screen
  - Select *Edit* in the *Truck Info* window and the *Truck Details* widow will open
  - Under the *Work Rules* column, update *EarlyStart* and *LateStart*
  - Save and reschedule
  - Close additional browser tabs and refresh the Route Board screen to view the new *Start Time*
- Method 2
  - Go to **Admin > Master Routes** and select the branch
  - Specify the *Day Code* and select the route # hyperlink, then select the *Route Info* tab
  - Select *Truck Info* under the *Work Rules* column and update *EarlyStart* and *LateStart*
  - Save and reschedule
  - 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
  - Select the *DriverID* for the driver running the route
  - Input the date/time the driver started the route
  - Select the *DeviceID* of the tracking device
  - Input the *TruckID*
  - Input the starting Odometer value of the truck (may have to input 0 if unknown)
  - 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*
  - Select Show me only accounts which are active but not schedule for service
  - Select Account ID hyperlink
  - Update any missing information
  - Go through Schedule Service Wizard

How do I Create a new Daily Route?

- *Dispatch > Routes > Create Route*
- Select the *Load Date* and *TruckID*, and *LoadID* (*RouteID*),
- Create Route > Add stops
- ** *Ensure* that the "Truck/Route" isn't currently a cloning Master Route (see Master Routes)
- ** *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 NEW 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 account does not exist within DRTrack you can create an account). Once account is created fill out create order information (time windows, order details, etc.) Click finish in 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 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.