



GETTING STARTED GUIDE

# Descartes® Route Planner™

**Version 17.05**

**May 2017**

---

The Descartes Systems Group Inc. | TSX: DSG | NASDAQ: DSGX | 120 Randall Drive, Waterloo, Ontario, N2V 1C6, Canada  
Toll Free 800.419.8495 | Int'l 519.746.8110 | [info@descartes.com](mailto:info@descartes.com) | [www.descartes.com](http://www.descartes.com)

CONFIDENTIAL AND PROPRIETARY TO THE DESCARTES SYSTEMS GROUP INC. AND ITS AFFILIATES

© 2017 The Descartes Systems Group Inc. All rights reserved.

Information in this document is subject to change without notice. The Descartes Systems Group Inc. and its affiliates and subsidiaries ("Descartes") make no warranties, express or implied, in respect of this document or its contents.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of The Descartes Systems Group Inc..

Descartes may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Descartes, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

Descartes Route Planner, Descartes Global Logistics Network (GLN), Descartes, the phrase "Helping Customers Deliver," and the Descartes logo are either registered trademarks or trademarks of Descartes and/or its affiliates or subsidiaries.

Microsoft and Internet Explorer are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

The names of other actual companies and products mentioned herein may be the trademarks of their respective owners.

## **Descartes® Route Planner™**

### **17.05**

#### **The Descartes Systems Group Inc.**

120 Randall Drive

Waterloo, Ontario Canada, N2V 1C6

Phone: 519-746-8110

Internet: <http://www.descartes.com>

#### **Customer Support**

In North America: 1-877-786-9339

Outside North America: +800 -7866-3390

e-mail: [servicedesk@descartes.com](mailto:servicedesk@descartes.com)

## Table of Contents

<b>Welcome to Descartes Route Planner .....</b>	<b>5</b>
Features.....	5
Learning to Use Descartes Route Planner .....	5
Descartes Route Planner Administrator's Guide .....	5
Descartes Route Planner User's Guide.....	5
Integration Strategies Guide .....	6
Descartes Routing and Scheduling Online Help .....	6
About This Guide .....	6
Document Conventions .....	6
<b>Order of Operations .....</b>	<b>8</b>
<b>Roles .....</b>	<b>10</b>
Base .....	10
Administrator .....	10
Planner .....	10
Dispatcher .....	11
Read-only .....	11
<b>Logging In .....</b>	<b>12</b>
User Names and Passwords .....	12
<b>Using the Interface .....</b>	<b>13</b>
Re-sizing the Descartes Logo .....	13
The Main Menu .....	14
Getting Help.....	14
The Dashboard/Home Page .....	14
Refreshing Data .....	14
Quadrant Options .....	15
Additional Quadrant Panel Options.....	16
Setting up Columns.....	16
Sorting.....	20
The Right-click Menu .....	20
Resetting Dashboard/Home Page Window Layout.....	20
Examining a Typical Page Layout – List View.....	20
Setting up Columns.....	21
Working with Lists.....	24
Finding Items in a List .....	25

Exporting List Results.....26

Printing List Results .....27

Working with Forms.....28

Field Values .....28

Wildcards.....28

Keyboard Shortcuts.....28

Date and Time Format.....28

**Managing User Profiles .....30**

Changing User Passwords .....30

Changing User Color Schemes.....30

Resetting All Columns to Default .....31

Changing Preferences .....31

Changing User Groups .....32

**Glossary .....33**

**Appendix A: Using the Menu Options .....35**

## Welcome to Descartes Route Planner

Descartes® Route Planner™ (formerly known as LNOS Fleetwise™) provides an efficient and flexible enterprise-class routing and scheduling logistics solution. Descartes Route Planner features and capabilities are specifically designed to enhance the management and optimization of pickup and delivery, order routing, and scheduling.

## Features

Descartes Route Planner provides the following key features:

- **Easy-to-use Business Document Interfaces:** self contained XML documents with process codes for simplified interfacing
- **Administrative Functions:** system configuration, settings, and data management
- **Pickup and Delivery Reservations Module:** quickly find and reserve available times on users fleet for appointments
- **Route Planning with Background Optimization:** sophisticated planning and optimization functions that work continuously behind the scenes to improve users Routes
- **Dispatch Management:** view and manage (add, remove, or reassign) work to Routes in progress
- **Wireless Dispatch Interfaces:** easily communicate with drivers in the field to assign new work, get statuses, and monitor Route progress
- **Descartes' Logistics Network Operating System™ (LNOS™) Technology:** based on Microsoft® Corporation's .NET architecture, LNOS enhances performance, scalability, and interoperability with other Descartes LNOS applications

## Learning to Use Descartes Route Planner

Users can learn about Descartes Route Planner from the following sources:

### Descartes Route Planner Administrator's Guide

This guide is written for the administrator and covers document and schedule management within Descartes Route Planner and offers complete dispatch and routing instructions.

### Descartes Route Planner User's Guide

This guide builds on the material in the this guide and focuses on the dispatch and routing functionality of Descartes Route Planner. The guide covers Route planning

activities and dispatch activities, including all activities associated with managing Routes being executed by drivers.

## Integration Strategies Guide

This document is intended for the Descartes Route Planner implementers. The guide provides an overview of the different methodologies that should be adopted when integrating Descartes Route Planner with external systems and when extracting data from LNOS applications. Some external systems include:

- External Order Management Systems
- External Databases
- External Asset Management Systems
- Reporting Engines
- Other Descartes applications such as Descartes Transportation Manager™, Transport Order Entry, Descartes Visibility™, Descartes Wireless/GPS™, etc.

This document includes integration methodologies recommended by Descartes Systems Group.

## Descartes Routing and Scheduling Online Help

Descartes Route Planner includes an online help system. It contains explanations of many features and functions within the Descartes Route Planner application, and procedures to guide users through the application's basic functionality.

## About This Guide

This guide provides information on all of the administrative functions within Descartes Route Planner, including:

- Managing templates, time zones, codes, and routing parameters
- Viewing, filtering, and managing data
- Entering orders

This guide also provides complete field reference information in an appendix.

## Document Conventions

This document uses the following conventions:

- Names of windows, frames, dialogs, menus, list boxes, and lists begin with uppercase and are bolded. (**Tools** menu, **Save** button)
- Key combinations that you press appear in mixed case. If the keys are joined by a plus sign (+), press and hold the first key simultaneously with the remaining keys (for example, CTRL+ALT+DEL).

- Text that you type appears in `Courier New` font. (Enter `USERID` in the login field.)
  - Cross-references to other documents, or to sections within the current document, appear in underlined italics. (See *[Saving a File](#)* for details.)
  - *Italics* are used for emphasis throughout this document.
- ➡ **Note**— Information important to a particular task or function is introduced with the note format and icon.
- ⓘ **Tip**— Information that may make completing a task easier, but isn't essential to the task, is introduced with the tip format and icon.
- ⚠ **Warning**— **This warning format indicates information that you need to pay particular attention to. Ignoring information presented as a warning could lead to damage and unexpected results. Disregarding information presented as a warning may result in damage to your software or data.**

## Order of Operations

Descartes Route Planner is a tool for managing the order-to-delivery process effectively.

The ultimate goal of Descartes Route Planner is to consolidate users supply chain data such that the end result produces a schedule that encompasses effective deployment of resources via an efficient Route to fulfill user's customer orders.

- 1 The administrator using the Descartes Route Planner Application Configuration menu needs to set up companies and users.
- 2 The administrator or planner sets up templates used in creating schedules. The template types are:
  - Schedules
  - Routes
  - Stops
- 3 Once the administrator or planner has set up the necessary templates, the next step is to create the schedules used to determine and assign activities for incoming orders.
- 4 Now that the schedules exist, the administrator or planner must populate the Descartes Route Planner database with the following data types for auto-assignment to schedule:
  - Locations (Depots Only)
  - Orders (Customer Location Information comes with the Orders)
  - Resources
  - ➡ **Note**—Typically, locations and orders are imported from an external application such as Transport Order Entry, Fleetwise Simulator, or any other integration performed by LNOS Drawbridge. Data imported into Descartes Route Planner is auto-assigned to a schedule based on the scheduleKey on each of the imported records. When importing orders, Descartes Route Planner translates orders into unassigned Stops and resources into empty Routes.
  - Buckets
  - ➡ **Note**—Routes are created automatically by Descartes Route Planner, based on the schedule setting provided with the resource that users create. Routes cannot exist without schedules and resources.
- 5 At this point, the planner typically assumes responsibility for the schedules. Specifically the planner is responsible for editing the schedules such that:



- unassigned Stops become assigned to empty or existing Routes
  - Stops are assigned optimally to Routes
  - resources are being used efficiently
  - Routes and schedules are optimized relative to users organization's criteria
- 6 Optimized schedules are now available for execution by the dispatcher. The dispatcher can:
- assign new orders and optimize Routes as new orders arrive
  - communicate with drivers, using wireless technology if implemented, to monitor the progress of Routes and communicate Route changes

➡ **Note**— For details regarding Descartes Route Planner and wireless technology, see the [Descartes Route Planner Integration Strategies Guide](#).

## Roles

In Descartes Route Planner, there are five types of users:

- Base
- Administrator
- Planner
- Dispatcher
- Read-only

🔄 **Note**— These roles are the pre-built roles that Descartes Route Planner comes with and can be customized or new roles can be created using these pre-built roles as baselines.

Main menu options may vary according to role.

### Base

The LNOSFW – Base user role provides a minimum set of permissions required for basic operation of the application. Additional custom roles can be used in combination with this new role to provide more granular control over the UI.

Alternate homepages can be used with this role to provide very limited access to specific types of users. For example, users may want to create a limited role for a customer support representative who only needs access the **Order Status List** page.

### Administrator

The administrator has access to all application functionality. Particularly, the administrator manages the setup and flow of data within Descartes Route Planner. Before planners and dispatchers can use Descartes Route Planner, the Administrator must set up:

- Templates
- Schedules
- Routes

See the *[Descartes Route Planner Administrator's Guide](#)* for details.

### Planner

The planner is capable of editing and executing data within Descartes Route Planner, but does not have access to the manual status option. See the *[Descartes Route Planner User's Guide](#)* for details.

## Dispatcher

The dispatcher manages Schedules, Routes, and Stops in real time so that orders are completed appropriately. The dispatcher can access the manual status option but will not be able to edit the Schedule or any other data element attributes in the schedule. See the *[Descartes Route Planner User's Guide](#)* for details.

## Read-only

The read-only user only has access to the application in a read-only mode. The data displayed cannot be changed.

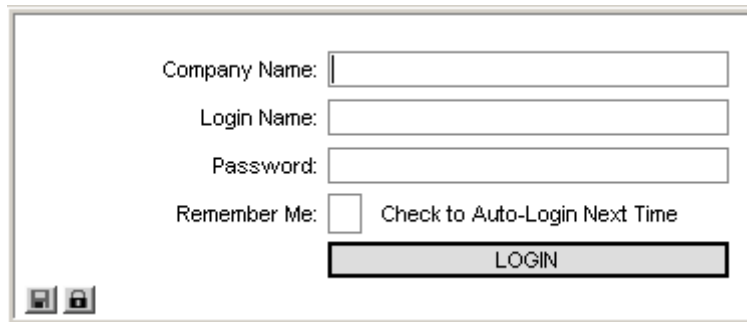
## Logging In

To log in to Descartes Route Planner:

- 1 Open Microsoft® Internet Explorer® and navigate to the URL for Descartes Route Planner.

➡ **Note**— The URL is specific to the user's deployment and is defined at the time of installation. If users do not know the URL for Descartes Route Planner, or if users do not know their particular Login Name or Password, contact the Descartes administrator.

The **Login** dialog appears:



- 2 Enter the user's Company Name.
- 3 Enter the user's Login Name.
- 4 Enter the user's Password.
- 5 Click **Login**. The **Descartes Route Planner Dashboard/Home** page appears.

➡ **Note**— The **Home** page and menu options may vary according to access roles. See [Appendix A: Using the Main Menu](#) for details.

## User Names and Passwords

User names are:

- 1-64 characters in length
- Case insensitive
- Can use special characters as well as standard alphanumeric characters

Passwords are:

- 0-128 characters in length
- Case sensitive
- Can use special characters as well as standard alphanumeric characters

## Using the Interface

This section provides instructions on the following topics:

- Re-sizing the Descartes Logo
- The Main Menu
- Getting Help
- The Dashboard/Home Page
- Examining a Typical Page Layout – List View
- Working with Lists
- Working with Forms

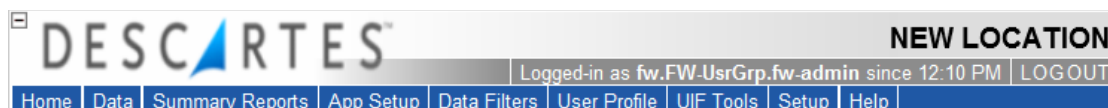
### Re-sizing the Descartes Logo

Users can maximize or minimize the size of the logo to provide more or less space for viewing data and performing tasks. The following illustrations show the logo in minimized and maximized states.



To minimize the maximized logo, click the small minus sign (◻) button beside the logo.

When the logo is maximized, the title of the current page, the logged in user's name, and the user's log in time appears:



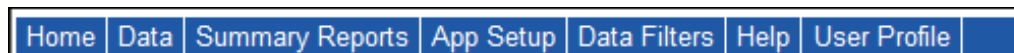
To maximize the minimized logo, click the small plus sign (⊕) button beside the logo.

When the logo is minimized, the title of the current page, the logged in user's name, and the time the user logged in disappears.



## The Main Menu

The main menu, located directly beneath the Descartes logo, provides users with options for performing the various functions within Descartes Route Planner:



➡ **Note**— Main menu options may vary according to access role. See [Appendix A: Using the Main Menu](#) for details.

## Getting Help

Descartes Route Planner includes an online PDF help system. It contains explanations of many features and functions within the Descartes Route Planner application, and contains procedures to guide users through the application's basic functionality.

To access online help for Descartes Route Planner, from the main menu, select: **Help > Contents**.

## The Dashboard/Home Page

The following image illustrates a typical view of the **Descartes Route Planner Dashboard/Home** page.

Within the **Dashboard/Home** page, users can view associated Descartes Route Planner data within a maximum of four separate windows (quadrants) available at one time.

### Refreshing Data

On the **Dashboard/Home** main page there is only one option that controls all elements, and that is the **Refresh** button.

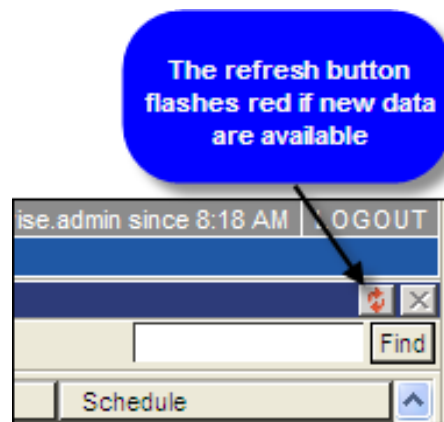
Descartes Route Planner regularly checks the database for changes in the schedule being worked on. These changes can include new or modified orders, or deleted orders.

Depending on how the system has been set up, Descartes Route Planner either updates the database automatically, or causes the **Refresh** button to flash red, indicating the data needs manual updating. See the [Setting Session Options](#) in the [Descartes Route Planner User's Guide](#) for details on refresh settings.

To manually refresh Descartes Route Planner data:

- 1 Check to see if the **Refresh** button is flashing red.







The **Refresh** button is located in the top right corner of the window, underneath the logout button.





- 2 Click the **Refresh** button to update the data.

### Quadrant Options

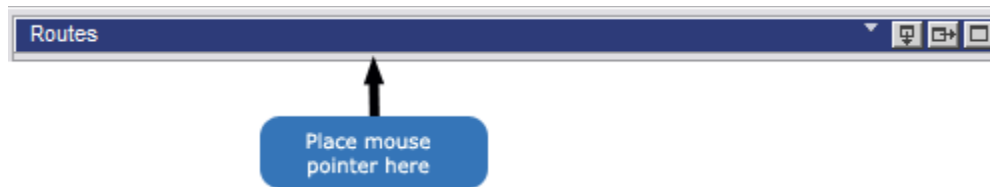
The following control buttons may appear within the blue bar of each **Dashboard** window:

-  — Displays a drop-down menu that displays the following options:
  - Schedule Summary
  - Routes
  - Alerts
  - Custom Mobile Alerts
  - Unassigned Stops
  - Route Details Window 1
  - Route Details Windows 2
  - Map
  - Resource Capacity Utilization
  - Resource Percentage Utilization
  - Route Gantt Chart
-  **Note**— Once users select an option from the drop-down menu, the window will become the view for the option chosen.
-  Reduces the number of windows in view on the left side of the Dashboard from 2 to 1.
-  Restores the number of windows in view on the left side of the Dashboard from 1 to 2.
-  Reduces the number of windows in view on the top half of the Dashboard from 2 to 1.
-  Restores the number of windows in view on the bottom half of the Dashboard from 1 to 2.

-  Reduces the number of windows in view on the Dashboard to 1.
-  — Restores the number of windows in view on the Dashboard to the previous number.

### Additional Quadrant Panel Options

Each panel on the **Dashboard/Home** page contains additional options that are hidden by default. To access these options, place the tip of the pointer on the bottom gray border of the portion of the panel containing its name:



The panel will expand below displaying the following options:

- Customize
- Reset
- Advanced Find
- Show All
- Auto Hide – click on this button to hide the additional options shown below. By default, the additional options are shown.
- Expand All – when data are nested within data, primarily found in the details views, this button will cause all nested data to expand for easy viewing.
- Collapse All – when nested data are displayed, clicking this button will hide all nested data within its parent container.

### Setting up Columns

When setting up columns within a window on the **Dashboard/Home** page, users can:

- Change the order
- Reset columns to their default order
- Remove an unwanted column
- Rename a column header

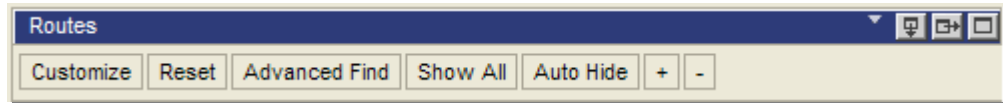
### Changing the Column Order

To change the order of the columns within a window on the **Dashboard/Home** page:

- 1 Hover the mouse in the blue bar of the window until the following optional buttons appear:
  - Customize
  - Reset

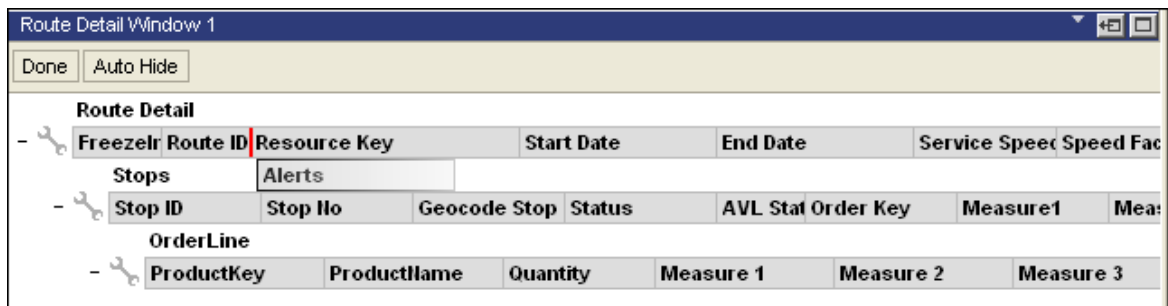


- Advanced Find
- Show All
- Auto Hide – click this button to hide the additional options shown below. By default, the additional options are shown.



Place cursor  
in blue bar  
for more options

- The + and – buttons expand or collapse additional options under each button on the Routes menu bar.
  - The **Find** button was removed when using Backend Paging. If Backend Paging is used, then the **Find** button will show on this bar.
- 2 Click **Customize**. The **Table** view becomes a **Column Header** view.
  - 3 Within the **Column Header** view, select a column header (for example, Alerts) and drag it to the desired location on the column heading line.
  - 4 Drag the column header until a red vertical bar appears in the new location:



- 5 Release the mouse button. In this example, the column header – **Alerts** – now appears between the column header **Route ID** and **Resource Key**.
- 6 If the **Done** and **Auto Hide** buttons do not appear, place the tip of the mouse on the bottom tan border of the Routes window to make the options appear.
- 7 To save this column, click **Done**.

**Or**

Press the ESC key to restore the column to its original text, and then click **Done**.


## Resetting Columns to Default Order

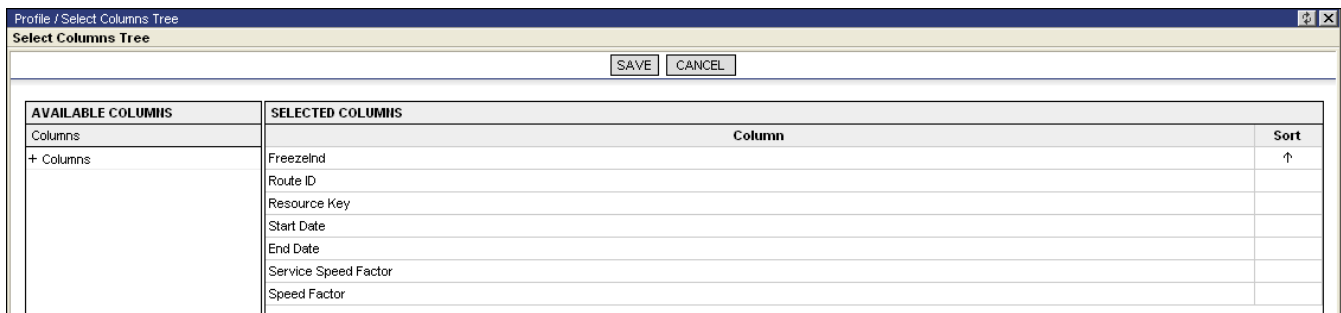
To reset columns to the default order within a window on the **Dashboard/Home** page:

- 1 If the additional options (Customize, Reset, Advanced Find, Show All, Auto Hide) are not visible, hover the mouse on the bottom (tan) border of the window until the additional options appear.
- 2 Click **Reset**. The columns revert to their default settings.

## Removing an Unwanted Column


To remove an unwanted column from the list area within a window on the **Dashboard/Home** page:

- 1 If the additional options (Customize, Reset, Advanced Find, Show All, Auto Hide) are not visible, place the mouse within the blue portion of the window until the additional options appear.
- 2 Click **Customize**. The **Table** view becomes a **Column Header** view.
- 3 In **Column Header** view, click  (wrench icon). The **Select Columns Tree** page appears.




AVAILABLE COLUMNS	SELECTED COLUMNS
Columns	FreezeInd
+ Columns	Route ID
	Resource Key
	Start Date
	End Date
	Service Speed Factor
	Speed Factor

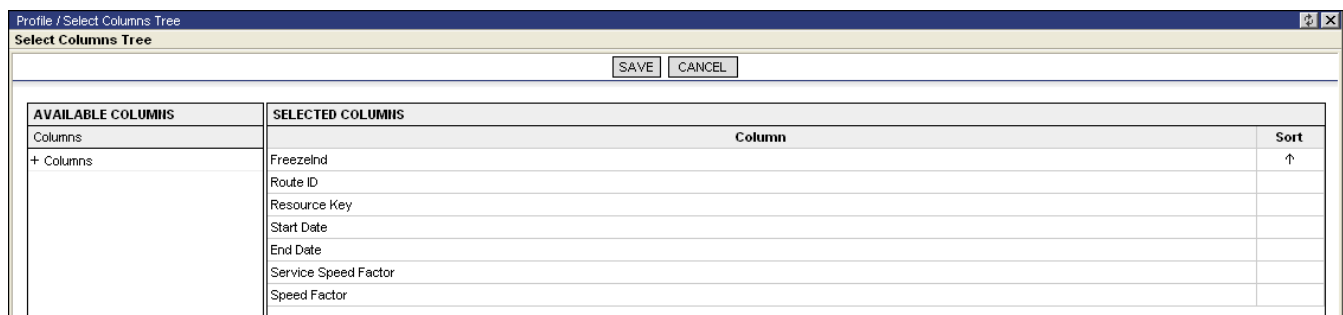
- 4 Under the **Available Columns**, click the + sign next to Columns. The **Columns** table expands to show all available columns.
 

 **Note**— Column labels in the **Selected Columns** section of the page have an asterisk (\*) adjacent to it in the **Available Columns** section.
- 5 To remove a selected column, drag and drop it back into the **Available Columns** section of the page.
- 6 To save the change and return to the **Column Header** view, click **Save**; otherwise click **Cancel**.
- 7 To return to the **Table** view, click **Done**.


## Restoring a Hidden Column to View

To restore a hidden column within a window on the **Dashboard/Home** page:

- 1 If the additional options (Customize, Reset, Advanced Find, Show All, Auto Hide) are not visible, place the mouse within the blue portion of the window until the additional options appear.
- 2 Click **Customize**. The **Table** view becomes a **Column Header** view.
- 3 In **Column Header** view, click  (wrench icon). The **Select Columns Tree** page appears.



- 4 Under the **Available Columns**, click the + sign next to Columns. The **Columns** table expands to show all available columns.
 

 **Note**— Column labels in the **Selected Columns** section of the page have an asterisk (\*) adjacent to it in the **Available Columns** section.
- 5 To add a column, drag and drop the column name(s) onto the **Selected Columns** section.
- 6 To save the change and return to the **Column Header** view, click **Save**; otherwise click **Cancel**.
- 7 To return to the **Table** view, click **Done**.

## Renaming a Column Header

To rename a column header within a window on the **Dashboard/Home** page:

- 1 If the additional options (**Customize**, **Reset**, **Advanced Find**, **Show All**, **Auto Hide**) are not visible, place the mouse within the blue portion of the window until the additional options appear.
- 2 Click **Customize**. The **Table** view becomes a **Column Header** view.
- 3 In **Column Header** view, click anywhere in the desired column header and edit the text appropriately.

- 4 If the **Done** and **Auto Hide** buttons do not appear, place the tip of the mouse on the bottom tan border of the window to make the options appear.
- 5 To save changes to the column header, click **Done**.

**Or**

Press the ESC key to restore the column to its original text, and then click **Done**.

### Sorting

Every view on the Dashboard allows users to sort by any of the columns shown on the tree views. Simply click the column text and it will sort in ascending order. If clicked again, it will sort in descending order.

Notice that an arrow will indicate what the current sorting order is after clicking a column. The sorting rule can be removed by clicking the arrow, and the view will be sorted using the default sorting rule.

### The Right-click Menu

In each window of the **Dashboard/Home** page, users can right-click to display a pop-up menu of options to perform relative to the items or highlighted item within the window. The bolded item in the right-click menu represents the default action. Double-click an item to perform its default action, as per the bold item listed in the right-click menu.

### Resetting Dashboard/Home Page Window Layout

To reset the **Dashboard/Home** page to the original default values:

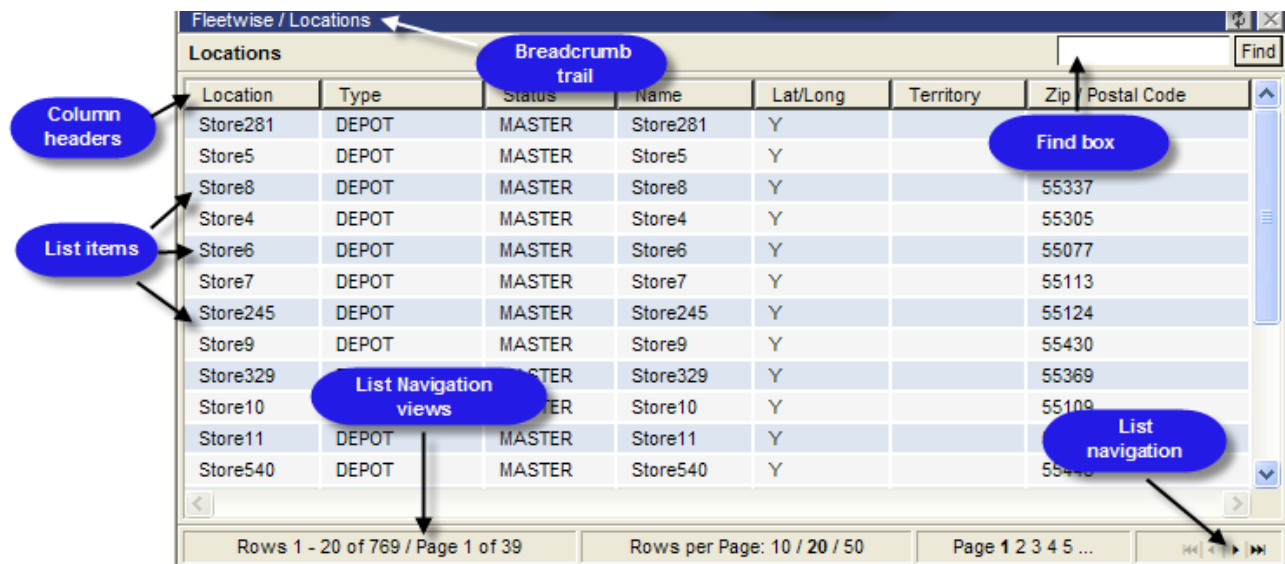
- 1 Right-click in the window's blue bar. A drop-down menu appears.
- 2 From the drop-down menu, select: **Reset Quadrant Layout**.

**Or**

- 1 Right-click within the window to display the right-click menu.
- 2 From the right-click menu, select: **Reset Quadrant Layout**.

## Examining a Typical Page Layout – List View

The following image illustrates the typical components of a **Descartes Route Planner Dashboard/Home** page.



➡ **Note**— Main menu options vary according to access role. See [Appendix A: Using the Main Menu](#) for details.

## Setting up Columns

When setting up columns, users can:

- Change the order
- Reset columns to their default order
- Remove an unwanted column
- Restoring a hidden column to view

## Changing the Column Order

To change the order in which columns appear in **List View**:

- 1 Select a column header (for example, Name) and drag it to the desired location on the column heading line.
- 2 Drag the column header until a red vertical bar appears in the new location:

Fleetwise / Locations				
Locations				
Location	Type	Status	Name	Lat/Long
RCCustomer1187	CUSTOMER	MASTER		Y
RCCustomer1359	CUSTOMER	MASTER		Y
RCCustomer3137	CUSTOMER	MASTER		Y

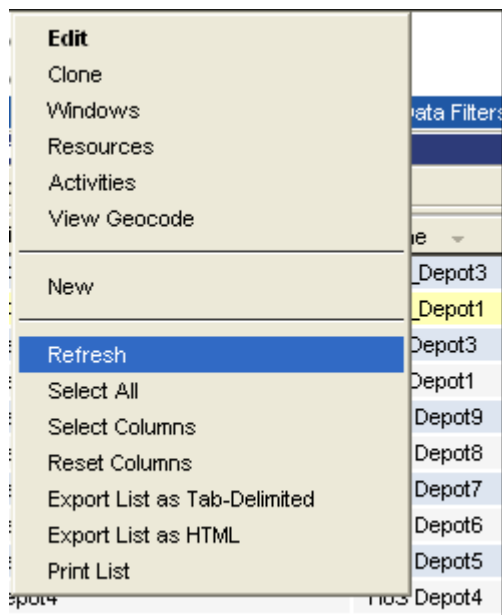
- 3 Release the mouse button. In this example, the column header, **Name** now appears between the column header **Location** and **Type**.

## Resetting Columns to Default Order

There are two ways to reset the columns:

To reset columns to the default setting:

- 1 Right-click anywhere within the results listing. The right-click menu appears:

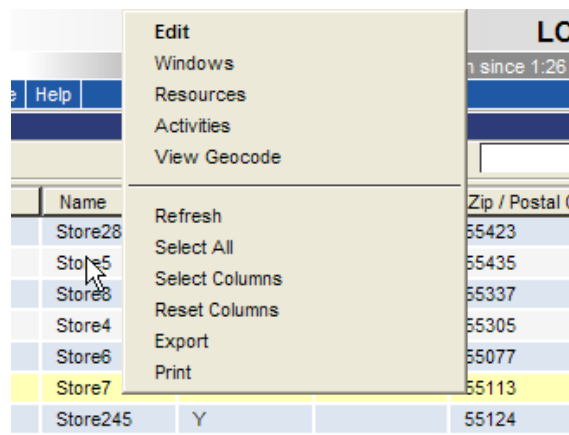


- 2 From the right-click menu, select: **Reset Columns**.

## Removing an Unwanted Column

To remove an unwanted column from display:

- 1 Right-click anywhere within the results listing. The right-click menu appears:



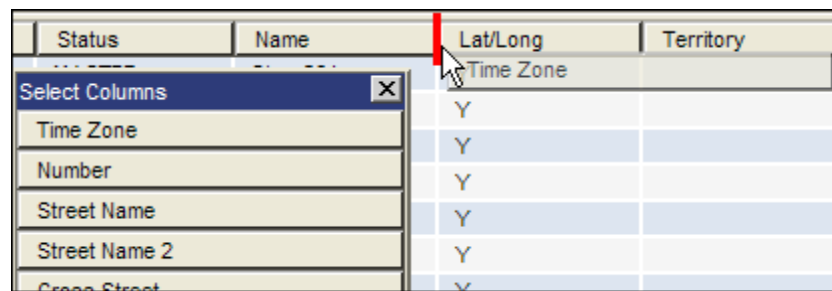
- From the right-click menu, select: **Select Columns**. The **Select Columns** dialog box appears.
- Click the column header and drag it to the **Select Columns** dialog box — specifically to the label **Drop unwanted columns here**. The name of the column just removed now appears in the **Select Columns** dialog box.
- Click to close the **Select Columns** dialog box.

#### Restoring a hidden Column to View

To restore a hidden column to view:

- From the **Select Columns** dialog box, click a column (for example Exception) and drag it to the column heading line where you want to insert it.
- ➡ **Note**—When selecting the column to add from the **Select Columns** list, the column name will not change state when selected, but once clicked, it will be captured by the mouse for depositing.

While dragging the column name, a red bar will appear in the column heading line where the application expects the user to drop it. In the following illustration, the user is adding the **Exception** column between the **Element** and **PO#** columns.



- 2 Click  to close the **Select Columns** dialog box.

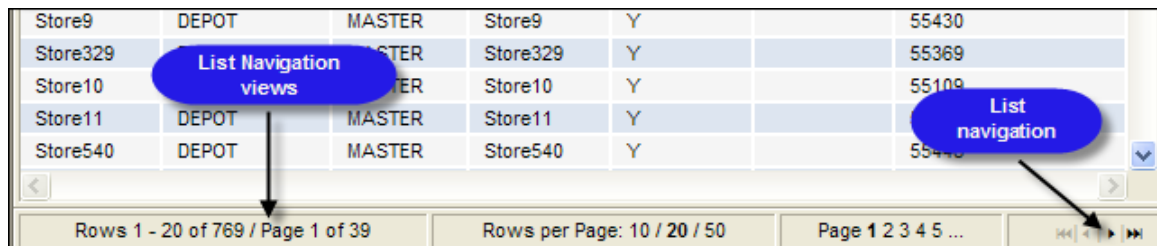
## Working with Lists

With items in a results list, users can:

- **Highlight** an item by clicking it. To highlight multiple list items in a series, hold the SHIFT key while clicking the first item, then the last item in the series. To highlight multiple list items at random, hold the CTRL key while clicking the first item, then the last item.
- **Right-click** an item to display a pop-up menu of options that users can choose to perform relative to the highlighted item, or columns on the page. The bold item in the right-click menu represents the default action.
- **Double-click** an item to perform its default action, as per the bold item listed in the right-click menu.
- **Select the entire list** by right-clicking a list item and selecting Select All from the right-click menu.

➡ **Note— Select All** selects the entire list — including those list items appearing on pages preceding and following the currently displayed page.






Descartes Route Planner provides a number of tools for navigating in long lists.



Store9	DEPOT	MASTER	Store9	Y		55430
Store329		MASTER	Store329	Y		55369
Store10		MASTER	Store10	Y		55109
Store11	DEPOT	MASTER	Store11	Y		
Store540	DEPOT	MASTER	Store540	Y		55430

Rows 1 - 20 of 769 / Page 1 of 39      Rows per Page: 10 / 20 / 50      Page 1 2 3 4 5 ...

As per the illustration, these tools include the following:

- **Rows per Page Selector** ( Rows per Page: 10 / **20** / 50 )  
Enables users to select the number of list items (10, 20, or 50) that are displayed on a single page in the list. The current selection is in bold text. Click one of the other selections to change the number of items displayed on each page.
- **Page Selector** (**1** 2 3 4 5)  
Enables users to jump directly to another page in the list. The current page number is in bold text. Click a page number to view that page in the list.
- **List Navigator** (     )  
Enables users to navigate through the list page-by-page. The four buttons in the list navigator are:
  -  Jump to the first page



- ◀ Jump to the previous page
- ▶ Jump to the next page
- ⏮ Jump to the last page

### Finding Items in a List

If users have a long list and are looking for a specific item, use the **Advanced Find**.

To find a document using the **Advanced Find**:

- 1 If the additional options (Customize, Reset, Advanced Find, Show All, Auto Hide) are not visible, place the mouse within the blue portion of the window until the additional options appear.
- 2 Click **Advanced Find**. A separate window appears.
- 3 Select the search term to use from the **Find where** drop-down menu:

📌 **Note**—The search term can correspond to any column that is currently displayed in the list.

- 4 Select a search term from the second drop-down menu and type in a value:

- 5 Click **Save**. If any part of a column's contents matches the search term, the record is included in the results. Items that do not match the search term are removed from the list.
- 6 To display all the items in the list again, click **Show All**. The **Show All** button appears beside the **Advanced Find** button.

### Exporting List Results

Users can transfer data displayed in a window, including any additional data available but not immediately visible, to a new browser window in CSV format or to an HTML webpage. From the spreadsheet, users can sort and manipulate results as required.



**Note—** Many result listing views enable the export data capability described here.

To export the results to a spreadsheet:

- 1 Right-click anywhere within the results listing and select **Export List as Tab-Delimited**.

A new window will open showing data has been exported to an Excel spreadsheet.

A1		= ROUTES														
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	ROUTES															
2																
3	Alerts	Resource	Schedule	Type	Earliest St	Depart	Return	Territory	No. of Stop	Distance	Last Status	Proj. Drive	Pct Proj.	On Board	1	
4		RESOURCE	Default	Sch 1-Day	21/1/2005	21/1/2005	21/1/2005	TC4	3	35.7	No Status	0:43	0%			
5		RESOURCE	Default	Sch 1-Day	21/1/2005	21/1/2005	21/1/2005	TC4	3	22.5	No Status	0:27	0%			
6		RESOURCE	Default	Sch 1-Day	22/1/2005	24/1/2005	24/1/2005	TC1	0		No Status	0:00	0%			
7		RESOURCE	Default	Sch 1-Day	22/1/2005	24/1/2005	24/1/2005	TC1	0		No Status	0:00	0%			
8		RESOURCE	Default	Sch 1-Day	22/1/2005	24/1/2005	24/1/2005	TC1	0		No Status	0:00	0%			
9		RESOURCE	Schedule	1 1-Day	22/1/2005	24/1/2005	24/1/2005	TC2	0		No Status	0:00	0%			
10		RESOURCE	Schedule	1 1-Day	22/1/2005	24/1/2005	24/1/2005	TC2	0		No Status	0:00	0%			
11		RESOURCE	Schedule	1 1-Day	22/1/2005	24/1/2005	24/1/2005	TC2	0		No Status	0:00	0%			
12		RESOURCE	Schedule	1 1-Day	22/1/2005	24/1/2005	24/1/2005	TC2	0		No Status	0:00	0%			
13		RESOURCE	Default	Sch 1-Day	22/1/2005	22/1/2005	22/1/2005	TC2	3	34.1	No Status	0:49	0%			

- 2 Click **File**, select **Save As** and select the appropriate format from the drop-down field **Save as type** to store the data as an Excel file.

➡ **Note**— The entire results content is exported to the spreadsheet, even if the page currently displays only part of the results.

To export the results to an HTML webpage:

- Right-click anywhere within the results listing and select **Export List as HTML**.

A new web page will display with your selected data formatted in a table.

### Printing List Results

Users can create print versions of the results in a new browser window. To create the print version:

To print list results:

- 1 Right-click anywhere within the results listing and select **Print**.

A new browser window will open displaying the results in a printable format.

Locations						
Location	Type	Status	Name	Lat/Long	Territory	Zip / Postal Code
Store281	DEPOT	MASTER	Store281	Y		55423
Store5	DEPOT	MASTER	Store5	Y		55435
Store8	DEPOT	MASTER	Store8	Y		55337
Store4	DEPOT	MASTER	Store4	Y		55305
Store6	DEPOT	MASTER	Store6	Y		55077
Store7	DEPOT	MASTER	Store7	Y		55113
Store245	DEPOT	MASTER	Store245	Y		55124
Store9	DEPOT	MASTER	Store9	Y		55430
Store329	DEPOT	MASTER	Store329	Y		55369
Store10	DEPOT	MASTER	Store10	Y		55109
Store11	DEPOT	MASTER	Store11	Y		55434
Store540	DEPOT	MASTER	Store540	Y		55448
Store15	DEPOT	MASTER	Store15	Y		55125
LOC_1	CUSTOMER	MASTER		Y	TC4	
LOC_2	CUSTOMER	MASTER		Y	TC2	
LOC_3	CUSTOMER	MASTER		Y	TC1	

- 2 To print the results, from the browser's menu bar, select **File > Print**.

## Working with Forms

When working with Descartes Route Planner, users are often required to enter data using forms. When using forms, it is useful to be aware of:

- Field values
- Wildcards
- Keyboard shortcut keys
- Date and time format

### Field Values

Fields are displayed using three styles, and these styles provide a visual guide to which fields users can edit, and which fields must contain information.

- Fields outlined in red are required, and users cannot save users data or changes unless users have entered an appropriate value in all of the fields outlined in red.
- Fields outlined in gray are optional.
- Fields that are solid gray are used for display purposes only and cannot be changed.

**i Tip**—Fields that cannot be edited on one page, may be required or optional on another page.

### Wildcards

The wildcard character, using the “Starts with” approach, is implicitly implied such that; if users enter a search term for a document key, the search includes all documents that begin with that key. For example, if users enter `TO1` for a transport order number, the search includes `TO11`, `TO12`, `TO101`, and any other purchase orders that begin with those characters. However, the search term `12` does not return the document `TO12`.

### Keyboard Shortcuts

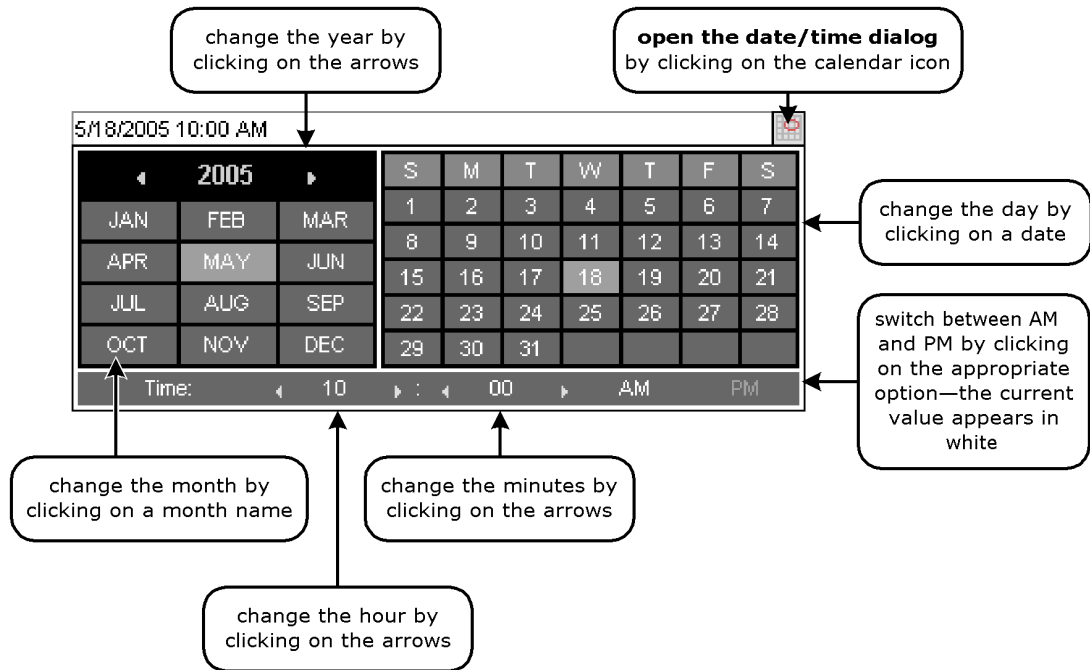
These keyboard shortcuts will help users to move around within Descartes Route Planner quickly.

- To navigate to the next field, press the TAB key.
- To navigate to the previous field, press SHIFT + TAB.

### Date and Time Format

Users can use the date/time dialog to quickly enter dates and times in Descartes Route Planner fields.

To open the date/time dialog, click the calendar icon to the right of the field. To enter a date, select the year, month, and day on the dialog. To enter a time, use the arrow keys to increase or decrease the hours and minutes, and select **AM** or **PM** to set the time of day.



The date and time value appears in the field, and changes as users adjust the values on the dialog.

## Managing User Profiles

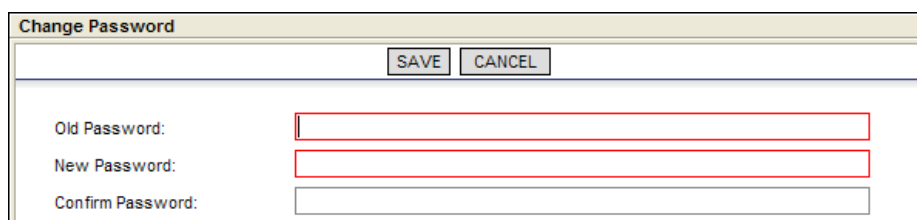
Descartes Route Planner provides the following tools for managing user profiles:

- Changing user passwords
- Changing user color schemes
- Resetting all layouts to default
- Changing preferences
- Changing User Groups

### Changing User Passwords

To change a password:

- 1 Select **User Profile > Change Password**. The **Change Password** dialog box appears:

A screenshot of the 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password'. Below the title bar are two buttons: 'SAVE' and 'CANCEL'. The main area of the dialog contains three labeled text input fields: 'Old Password:', 'New Password:', and 'Confirm Password:'. Each field is outlined with a red border.

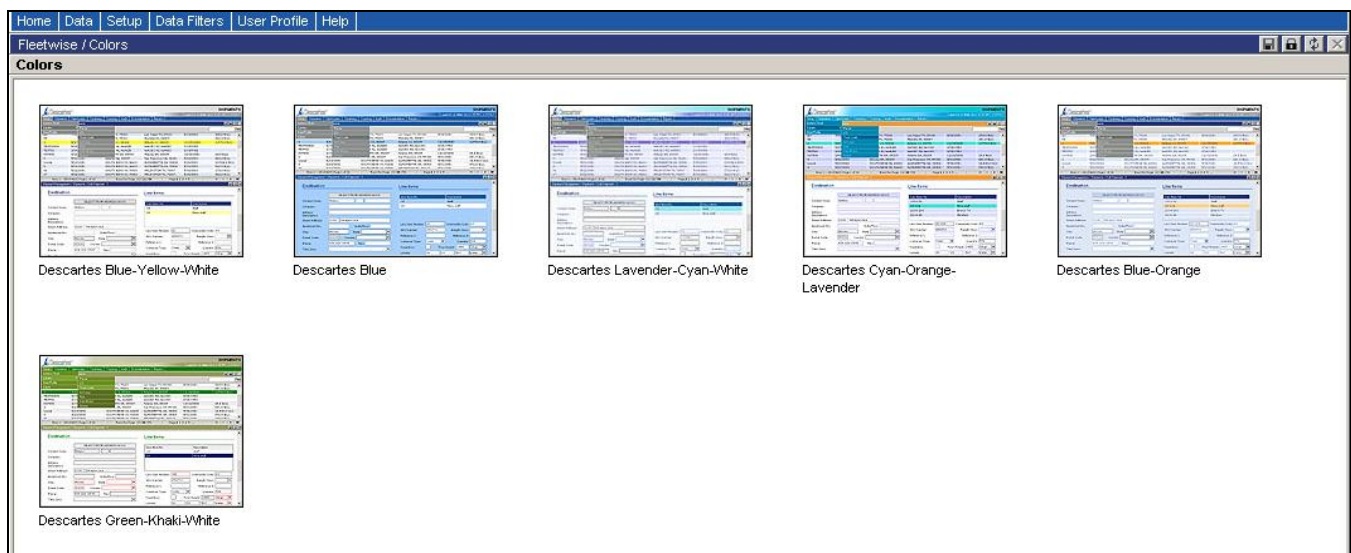
- 2 In the **Old Password** field, enter the user's current password.
- 3 In the **New Password** field, enter the user's new password.
- 4 In the **Confirm Password** field, re-enter the user's new password.
- 5 Click **Save** to save the new password. The new password is effective at the time of the user's next login.

➡ **Note**— To cancel the password change operation, click **Close**.

### Changing User Color Schemes

To change a user's color scheme:

- 1 From the main menu, select **User Profile > Color Scheme**.  
The **Colors** page appears:



- 2 Click the color scheme to use. The color scheme will be immediately applied to the application user interface.

## Resetting All Columns to Default

To reset all application columns to their default value:

- Select **User Profile > Reset All Columns to Default**.

## Changing Preferences

To change application preferences:

- Select **User Profile > Preferences** and modify the following as desired.
  - Currency
  - Date Format – select one of the following date formats:
    - MDY (Month, Day, Year)
    - DMMYYYYY (Day, Month, Year)
    - DMY (Day, Month, Year)
- ➡ **Note**— If you change your date format, you must LOGOUT and log back in for the changes to take effect.
- Language
- Measurement System – select one of the following measurement systems:
  - US (British Imperial System)
  - Metric System

- Time Zone
- E-Mail Address - enter a desired e-mail address
- Screen Font - modify the font attributes as desired

## Changing User Groups

Depending on the user security level, the user may have access to more than one user group. If so, the user can change which user group is viewed in Descartes Route Planner.

To change the user group:

- 1** Select **User Profiles > Change User Group**.
- 2** Double-click on the desired User Group.



## Glossary

**Administrator** – A role definition that has access to all application functionality. The administrator manages the setup and flow of data within Descartes Route Planner.

**Bucket** – A service time window interval used to offer reservation slots to customers. Buckets are identified by date/time boundaries.

**Dispatcher** – A role definition that allows execution functionality in the system. Wireless and Status updates are included in this role's functionality.

**LNOS Drawbridge** – Descartes' core functionality for Publish/Subscribe mechanisms. It allows integration of documents other LNOS-based Descartes applications as well as external applications.

**LNOS** – Logistics Network Operating System, acronym used for Descartes' standard development architecture.

**Order** – A movement request of goods from one geographic location to another. An order in Descartes Route Planner can be either a transportation order or a bill of lading, and supports the information included in either type of document.

**Planner** – A role definition used for planning purposes. Some data editing capabilities are enabled for this role as well as all optimization commands.

**Resource** – A data definition of a physical unit that can actually perform the work. It is used in the planning and execution of orders. A resource has characteristics such as capacity, costs, availability, and restrictions, etc. For example, a truck or a truck/trailer/driver are both resources.

**Rmpi** – The Descartes Route Planner optimization engine.

**Route** – Routes are used to link a specific schedule with a specific resource. All the Resource settings are copied to the Route record and can be modified within a Route so that different settings can be used to build different Routes from the same resource and different schedules.

➡ **Note**— Routes are created automatically by Descartes Route Planner, based on the schedule setting provided with the resource users create. Routes cannot exist without schedules and resources.

**Schedule** – A group of entities that represent the different aspects of the schedule settings, Routes, and their Stops. A schedule is used to communicate the results of an optimization function for export or execution. A schedule is also a collection of logistics tables that can be combined to create a logistics plan. These tables include Schedules, Routes, Stops and buckets. Different Schedules let users group these logistics tables, so that users can combine or split routing problems to suit user's business model.

**Stop** – A physical geographic point that represents a portion or entirety of an order. It holds all the planning information of an order.

**Template** - Users can set up templates that represent commonly used Schedules, Routes, and Stops in a user's organization, so that users can create Schedules, Routes and Stops quickly and accurately.

**Transportation Order** - A movement request of goods from one geographic location to another, specifying date and time, pickup and delivery locations, and quantities.

**Transport Order Entry** - Transport Order Entry System, sometimes referred to as TOE, enables external systems to communicate with FW via http. This application contains http listeners that enable interfaces the execution of multiple functions in one single call or xml.

## Appendix A: Using the Menu Options

The Descartes Route Planner menu options provide users with options for performing the various functions in Descartes Route Planner. The available menu options are:

<b>Home</b>	<ul style="list-style-type: none"> <li>Opens the Descartes Route Planner Dashboard or <b>Home</b> Page</li> </ul>
<b>Data</b>	<ul style="list-style-type: none"> <li>Contains all options for viewing data elements in Descartes Route Planner</li> </ul>
Schedules	<ul style="list-style-type: none"> <li>Displays the <b>Schedules</b> page and provides access to commands for creating, editing, and deleting schedules</li> </ul>
Routes	<ul style="list-style-type: none"> <li>Lists all Routes contained in the DB and allows viewing capabilities</li> </ul>
Unassigned Stops	<ul style="list-style-type: none"> <li>Lists only unassigned Stops and allows viewing capabilities</li> </ul>
Buckets	<ul style="list-style-type: none"> <li>Lists all Buckets contained in the DB and allows editing capabilities</li> </ul>
AVL	<ul style="list-style-type: none"> <li>Lists all AVL settings contained in the DB and allows editing capabilities</li> </ul>
Asset Gantt Chart	<ul style="list-style-type: none"> <li>Displays the Asset Gantt Chart</li> </ul>
Locks	<ul style="list-style-type: none"> <li>Lists all Schedule Locks in the system</li> </ul>
Schedule Groups	<ul style="list-style-type: none"> <li>Displays the Schedule Groups list page</li> </ul>
Master Route Mgmt Mode	<ul style="list-style-type: none"> <li>Starts the Master Route working mode. Only master route will be available in the Quadrant</li> </ul>
Import Master Routes	<ul style="list-style-type: none"> <li>This menu options allows users to Import Master Routes using the DocRouteDetail.xml format</li> </ul>
Routing Mode	<ul style="list-style-type: none"> <li>Starts the mode to Routing (standard mode when application is first started up)</li> </ul>
Resources	Displays the <b>Resources</b> page and provides access to commands for creating, editing, and deleting resources
Orders	
Search Status	<ul style="list-style-type: none"> <li>Displays the <b>Search Order Status</b> window, allowing users to search orders by OrderKey</li> </ul>

POD Sheet	<ul style="list-style-type: none"> <li>Displays the <b>POD Sheet</b> window allowing users to search POD Sheets by OrderKey</li> </ul>
Locations	Displays the <b>Locations</b> page and provides access to commands for creating, editing, and deleting resources
Commodities	<ul style="list-style-type: none"> <li>Displays specific Commodities constraints. For example, certain jobs should not be on a vehicle at the same time as other jobs because of a certain characteristic.</li> </ul>
Routing Parameters	<ul style="list-style-type: none"> <li>Displays the <b>Routing Parameters</b> page and provides access to commands for creating, editing, and deleting routing parameters</li> </ul>
Templates	<ul style="list-style-type: none"> <li>Displays a sub-menu of specific template options</li> </ul>
Schedule	<ul style="list-style-type: none"> <li>Displays the <b>Schedule Template</b> page and provides access to commands for creating, editing, and deleting schedule templates</li> </ul>
Route	<ul style="list-style-type: none"> <li>Displays the <b>Route Template</b> page and provides access to commands for creating, editing, and deleting Route templates</li> </ul>
Stop	<ul style="list-style-type: none"> <li>Displays the <b>Stop Template</b> page and provides access to commands for creating, editing, and deleting stop templates</li> </ul>
Buckets	<ul style="list-style-type: none"> <li>Displays the <b>Bucket Template</b> page and provides access to commands for creating, editing, copying and deleting bucket templates, and creating buckets</li> </ul>
Message	<ul style="list-style-type: none"> <li>Displays the <b>Message Template</b> page and provides access to commands for creating, editing, and deleting message templates</li> </ul>
Resource Template Sets	<ul style="list-style-type: none"> <li>Displays the <b>Resource Template Sets</b> page and provides access to commands for creating, editing, and deleting resource template sets</li> </ul>
Territories	
Definition	<ul style="list-style-type: none"> <li>Displays the Territories page and provides access to commands for creating, editing, activating/deactivating, and deleting territories</li> </ul>

Swaps	<ul style="list-style-type: none"> <li>Displays the <b>Swaps</b> page and provides access to commands for creating, editing, activating/deactivating, and deleting territory swaps</li> </ul>
Assets	<ul style="list-style-type: none"> <li>Displays a sub-menu of specific asset options</li> </ul>
Drivers	<ul style="list-style-type: none"> <li>Displays the <b>Drivers</b> page and provides access to commands for creating, editing, cloning, and deleting drivers</li> </ul>
Driver Assignments	<ul style="list-style-type: none"> <li>Displays the <b>Driver Assignments</b> tab, allowing users to view and search driver assignments in the system</li> </ul>
Trucks	<ul style="list-style-type: none"> <li>Displays the <b>Trucks</b> page and provides access to commands for creating, editing, cloning, and deleting trucks</li> </ul>
Truck Assignments	<ul style="list-style-type: none"> <li>Displays the <b>Truck Assignments</b> tab, allowing users to view and search truck assignments in the system</li> </ul>
Trailers	<ul style="list-style-type: none"> <li>Displays the <b>Trailers</b> page and provides access to commands for creating, editing, cloning, and deleting trailers</li> </ul>
Trailer Assignments	<ul style="list-style-type: none"> <li>Displays the <b>Trailer Assignments</b> tab, allowing users to view and search trailer assignments in the system</li> </ul>
Cost Profiles	<ul style="list-style-type: none"> <li>Displays the <b>Cost Profiles</b> page and provides access to commands for creating, editing, and deleting cost profiles</li> </ul>
Messages	<ul style="list-style-type: none"> <li>Displays the messages Advanced Find quadrant page.</li> </ul>
Product Types	<ul style="list-style-type: none"> <li>Displays the <b>Product Types</b> page and provides access to commands for creating, editing, copying, and deleting product types</li> </ul>
Alert Management	<ul style="list-style-type: none"> <li>Displays the <b>Alert Management</b> page, allowing users to search and manage alerts in the system</li> </ul>
API Tracking	
Schedules	<ul style="list-style-type: none"> <li>Displays the <b>Schedules</b> list page for tracking APIs</li> </ul>

Resources	<ul style="list-style-type: none"> <li>Displays the <b>Resources</b> list page for tracking APIs</li> </ul>
Publish Routes	<ul style="list-style-type: none"> <li>Displays the <b>Publish Routes</b> list page for tracking APIs</li> </ul>
Orders	<ul style="list-style-type: none"> <li>Displays the <b>Orders</b> list page for tracking APIs</li> </ul>
Parties	<ul style="list-style-type: none"> <li>Displays the <b>Parties</b> list page for creating and editing parties</li> </ul>
<b>Summary Reports</b>	
Geocoding Summary	<ul style="list-style-type: none"> <li>Displays the <b>Geocoding Summary</b> report</li> </ul>
Missed Time Window Summary	<ul style="list-style-type: none"> <li>Displays the <b>Missed Time Window Summary</b> report</li> </ul>
Route Detail Summary	<ul style="list-style-type: none"> <li>Displays the <b>Route Detail Summary</b> report</li> </ul>
Route Summary	<ul style="list-style-type: none"> <li>Displays the <b>Route Summary</b> report</li> </ul>
Plan vs Actual Route Summary	<ul style="list-style-type: none"> <li>Displays the <b>Plan vs Actual Route Summary</b> report</li> </ul>
Plan vs Actual Stop Summary	<ul style="list-style-type: none"> <li>Displays the <b>Plan vs Actual Stop Summary</b> report</li> </ul>
Schedule Summary	<ul style="list-style-type: none"> <li>Displays the <b>Schedule Summary</b> report</li> </ul>
Master Stops Without Actual Orders	<ul style="list-style-type: none"> <li>Displays the <b>Master Stops Without Actual Orders</b> report when in the Master Route Mgmt mode</li> </ul>
<b>App Setup</b>	
Dataset	<ul style="list-style-type: none"> <li>Displays a submenu of specific dataset options</li> </ul>
Groups	<ul style="list-style-type: none"> <li>Displays the <b>Data Set Groups</b> page and provides access to commands for creating, editing, and deleting data set groups</li> </ul>
Nestings	<ul style="list-style-type: none"> <li>Displays the <b>Data Set Nestings</b> page and provides access to commands for creating, editing, and deleting data set nestings</li> </ul>
Values	<ul style="list-style-type: none"> <li>Displays the <b>Data Set Values</b> page and provides access to commands for creating, editing, and deleting data set values</li> </ul>

Data Slice Sets	<ul style="list-style-type: none"> <li>Displays the <b>Data Slice Sets</b> page and provides access to commands for creating, editing, and deleting data slice sets</li> </ul>
Data Slice Set Schedules	<ul style="list-style-type: none"> <li>Displays the <b>Data Set Values</b> page and provides access to commands for creating, editing, and deleting data slice set schedules</li> </ul>
Properties	<ul style="list-style-type: none"> <li>Displays the <b>Data Set Values</b> page and provides access to commands for creating, editing, and deleting data set properties</li> </ul>
Application Configuration	<ul style="list-style-type: none"> <li>Contains all options for configuring Descartes Route Planner</li> </ul>
Key Wizard	<ul style="list-style-type: none"> <li>Displays the <b>Key Wizard</b> page and provides access to commands for creating, editing, copying, and deleting an order or resource WizardKey</li> </ul>
Requirement Setup	<ul style="list-style-type: none"> <li>Displays a submenu of specific filter options</li> </ul>
Requirement Sets	<ul style="list-style-type: none"> <li>Displays the <b>Requirement Sets</b> page and provides access to commands for creating, editing, and deleting a requirement set</li> </ul>
Requirements	<ul style="list-style-type: none"> <li>Displays the <b>Requirements</b> page and provides access to commands for creating, editing, and deleting a requirement</li> </ul>
Alert Codes	<ul style="list-style-type: none"> <li>Displays the <b>Alert Codes</b> page and provides access to commands for creating, editing, and deleting an alert code</li> </ul>
Clear Optimization Lock	<ul style="list-style-type: none"> <li>Clears all locks placed on the tables during optimization</li> </ul>
Maintenance	<ul style="list-style-type: none"> <li>Opens a submenu of specific maintenance options</li> </ul>
FW Archive	<ul style="list-style-type: none"> <li>Displays the <b>Archive</b> dialog for archiving Descartes Route Planner tables in a separate table</li> </ul>
FW Archive Orphan Locations	<ul style="list-style-type: none"> <li>Displays the <b>Archive</b> dialog for archiving orphan locations in a separate table</li> </ul>
Clean Up MessageLog	<ul style="list-style-type: none"> <li>Displays the <b>Archive</b> dialog for cleaning up all messages from CtyMsgLog, CtyMsgTrace,</li> </ul>

	CtyMsgLogParm from any DCF%, DCFSec%, or Sec% databases
TextKey Editor	<ul style="list-style-type: none"> <li>Displays the <b>Text Editor</b> page for editing text languages and text category groupings</li> </ul>
wGLN	<ul style="list-style-type: none"> <li>Opens Descartes wGLN in a new tab</li> </ul>
Icon Customization	
Mappings	<ul style="list-style-type: none"> <li>Displays the <b>Mappings</b> list page, allowing users to create and edit icon mappings</li> </ul>
Profiles	<ul style="list-style-type: none"> <li>Displays the <b>UI Customizations Profiles</b> list page, allowing users to create and edit customized profiles for the user interface</li> </ul>
System Values	<ul style="list-style-type: none"> <li>Displays the <b>System Values</b> list page</li> </ul>
Field Data	<ul style="list-style-type: none"> <li>Displays the <b>Field Data</b> list page</li> </ul>
Call Out Notification Profile	<ul style="list-style-type: none"> <li>Displays the <b>Call Out Notification Profile</b> list page, allowing users to create new profiles or edit existing ones</li> </ul>
<b>Data Filters</b>	
Select Schedule	<ul style="list-style-type: none"> <li>Displays the <b>Select Schedule</b> dialog and lets users select a schedule to work with</li> </ul>
Options	<ul style="list-style-type: none"> <li>Displays the <b>Options</b> dialog and lets users select options for displaying and updating users data</li> </ul>
Filtering	<ul style="list-style-type: none"> <li>Displays the <b>Filtering</b> dialog and lets users select options for filtering users data</li> </ul>
Find	
Route	<ul style="list-style-type: none"> <li>Opens the <b>Find</b> window with the <b>Route</b> tab displayed</li> </ul>
Stop	<ul style="list-style-type: none"> <li>Opens the <b>Find</b> window with the <b>Stop</b> tab displayed</li> </ul>
Filter Management	<ul style="list-style-type: none"> <li>Displays the <b>Filter Management</b> list page</li> </ul>
<b>User Profile</b>	Contains all features related to a specific user, defining the appearance and behavior of customizable aspects of the application
Change Password	<ul style="list-style-type: none"> <li>Displays the <b>Change Password</b> dialog and lets users change the password</li> </ul>



Color Scheme	<ul style="list-style-type: none"> <li>Displays the <b>Color Scheme</b> page and lets users change the application's color scheme</li> </ul>
Reset All Columns	<ul style="list-style-type: none"> <li>Resets columns to original format</li> </ul>
Preferences	<ul style="list-style-type: none"> <li>Displays the <b>User Profile</b> page and lets users change user information (e-mail address, phone number) and screen font preferences</li> </ul>
Change User Group	<ul style="list-style-type: none"> <li>Displays the <b>Change User Group</b> dialog box and lets users change the user group</li> </ul>
Profile Items	<ul style="list-style-type: none"> <li>Displays the <b>User Profile Items</b> page</li> </ul>
<b>Help</b>	
Contents	<ul style="list-style-type: none"> <li>Displays the table of contents for Descartes Route Planner online help system. Contains explanations of many features and functions within the Descartes Route Planner application, as well as procedures to guide users through the application's basic functionality</li> </ul>
About Descartes Route Planner	<ul style="list-style-type: none"> <li>Displays the running version number of Descartes Route Planner, and contact information for Customer Support</li> </ul>

These menu options are accessible to users depending on the role that has been assigned to them. Descartes Route Planner comes with a set of pre-built roles that can be customized or new roles can be created using these pre-built roles as baselines.

The pre-built roles included in Descartes Route Planner are:

- **Administrator (Admin)** – has access to every single menu option available in the application
- **Planner** – has same access as Admin except for the following Setup and Execution menu items:
  - Manual Status Updates
  - App Setup
  - Add/Edit/Remove Schedule
- **Dispatcher** – has same access as Planner, but does have access to Execution items (manual status)
- **Read-only** – has access to the application in a read-only mode. Cannot change the data displayed.