# DESCARTES™

# Descartes® Route Planner™
## Reservations and Visibility Portal

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**Reservations and Visibility Portal**

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# Introduction

The Reservations and Visibility Portal application provides quick access to the service progress of orders at any point in the planning and execution cycle. This application allows users without expert knowledge of route optimization to quickly schedule new, routed or unrouted orders from service date alternatives provided by the system. Advise and Confirm optimization calls can be invoked for orders in the Reservations and Visibility Portal.

The Reservations and Visibility Portal application is secured by the Descartes® Route Planner™ role-based access control to allow role access definitions and Single Sign On (SSO) capabilities.

> ⮑ **Note—** Reservations and Visibility Portal requires Microsoft Corporation's Internet Explorer® 9 or later versions. The application may not function properly on previous versions.

# 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.**

## Logging In

The following Descartes Route Planner users can access the Reservations and Visibility Portal:

- Administrators
- Planners
- Dispatchers
- Read-only Users
- Customer Service Agents: This type of user only has access to the Reservations and Visibility Portal and no other components of Descartes Route Planner.

Only administrator users can configure the Reservations and Visibility Portal to be the home page of a user upon login.

To log in to Reservations and Visibility Portal:

**1** Open your browser and navigate to the URL for the Reservations and Visibility Portal.

⮎ **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, or if users do not know their particular Login Name or Password, contact the Descartes administrator.

The **Login** page appears:



**2**   Enter the user's Company Name.

**3**   Enter the user's Login Name.

**4**   Enter the user's Password.

**5**   Click Remember Me to have the system remember the login credentials and ignore login time out settings.

**6**   Click **Login**. The **Order List** page appears.

When using Single Sign On (SSO), this page is not required.

# Using the Order List

When users log in to Reservations and Visibility Portal, the **Order List** page is displayed. The **Order List** page is the central console of the Reservation and Visibility Portal. For orders that are complex/double-ended, the system displays Customer detail, ETA, Status, Start Time and End Time of the delivery portion as well.

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Welcome fw-admin   Log off

**Home**   Configuration

Enter a text

Optional columns:  WindowEarliestDate

| Order | Customer | ETA | Start Date | Status |
|---|---|---|---|---|
|  |  |  |  | Select Filter |
| zzz2 | Loc3 |  |  | Pending |
| zzz1 | Loc2 | 2014-12-10T08:00:00 |  | Pending |
| zzyyyyyy | ZSV_13_2_1_16 |  |  | Pending |
| zz54002zz | Loc2 |  |  | Pending |
| ZUZ | RCCustomer0351 | 1900-12-30T01:00:00 |  | Pending |
| ZSV_P_D3 | 59597 |  |  | Pending |
| ZSV_p_d2 | 59597 | 2014-05-24T10:42:24 |  | Pending |
| ZSV_P_D_2 | 13211__AVLCustomer1173 |  |  | Pending |
| ZSV_P_D | 59597 |  |  | Pending |
| ZSV_Order_X_Test_18881 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_11444 | XML_016_TTCustomer1053 | 2015-04-15T14:50:00 |  | Completed |
| ZSV_Order_X_Test_11333 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_111333 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_1112222 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_111118881 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_1111111x11 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_111111111 | XML_016_TTCustomer1053 |  |  | Pending |
| ZSV_Order_X_Test_11111 | XML_016_TTCustomer1053 |  |  | Pending |

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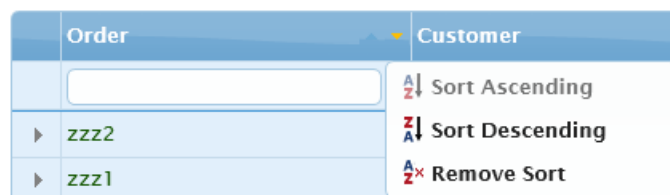
### Adding Columns

Users can add columns to the **Order List** page from the **Optional Columns** dropdown.
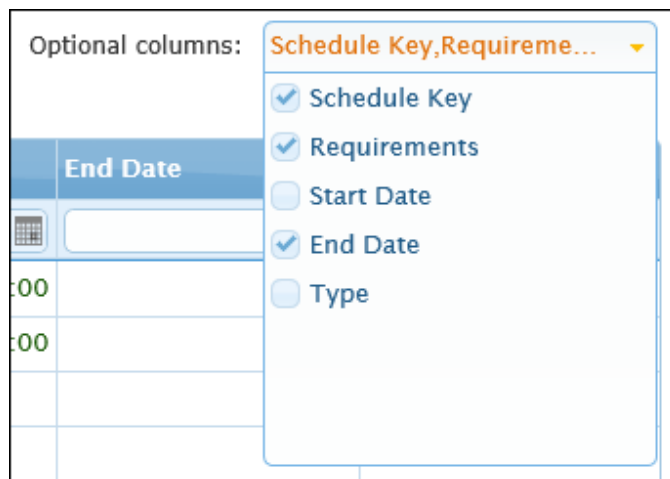


### Sorting

Certain columns can be sorted in ascending or descending order by hovering the mouse cursor over the column header and clicking the orange arrow that appears to display the sort menu. Click **Remove Sort** to reset the list to the default order.



### Filtering

Users can filter the **Order List** page in two ways: by column value or via the wild card search.

**Wild Card Search**

Search criteria entered in wildcard search field apply to the Order Key, Location Key, Requirement and Order Line Status columns.



Click the 'X' icon to remove the all filters and search criteria applied to the **Order List** page, including column filters, pie charts and wild card search input.

**Filter by Column**

Data in the **Order List** can be filtered using the search fields, calendar controls or dropdowns under the label of each column.
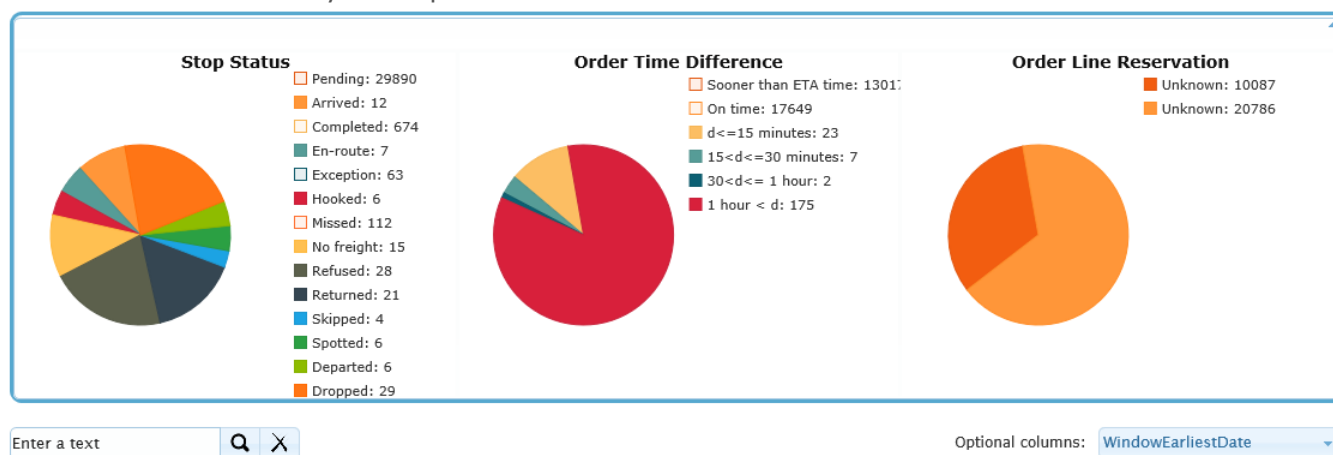
### Pie Charts

Click the chart icon to display a series of pie charts at the top of the page. These charts provide Stop Status, Order Time Difference and Order Line Reservation details.

- **Stop Status:** Represents the current stop status ratio.
- **Order Time Difference:** Represents the current ratio for order time difference. The system compares planned and projected times of stops and charts the delta value.
- **Order Line Status:** Represents the current reservation ratio of order lines, e.g. "Ready to Ship" or "Confirmed"



The pie charts are updated dynamically based on the user's filter/search criteria. Users can select a slice of the chart to filter the **Order List** by the selected value. For example, if users select the "Arrived" segment of the Stop Status chart, the Order List will reload and display only orders with a Stop Status of "Arrived".

Users can hide segments of the charts by clicking the associated label in the legend. When a slice is hidden, the associated color icon on the legend appears unfilled.

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## Order Tracking and Visibility

From the **Order List** page, users can click the arrow next to an order to view Order details. The following tabs appear.

### Detail

Displays all stops and line items. Users can edit the Requirements field at the order level and/or the Quantity, Requirements and Measure values at the order line level of Pending orders.

Users can also perform an Advise call from this tab to return potential time slots for routing. The advise process is described in the *Advise and Confirm* section below.
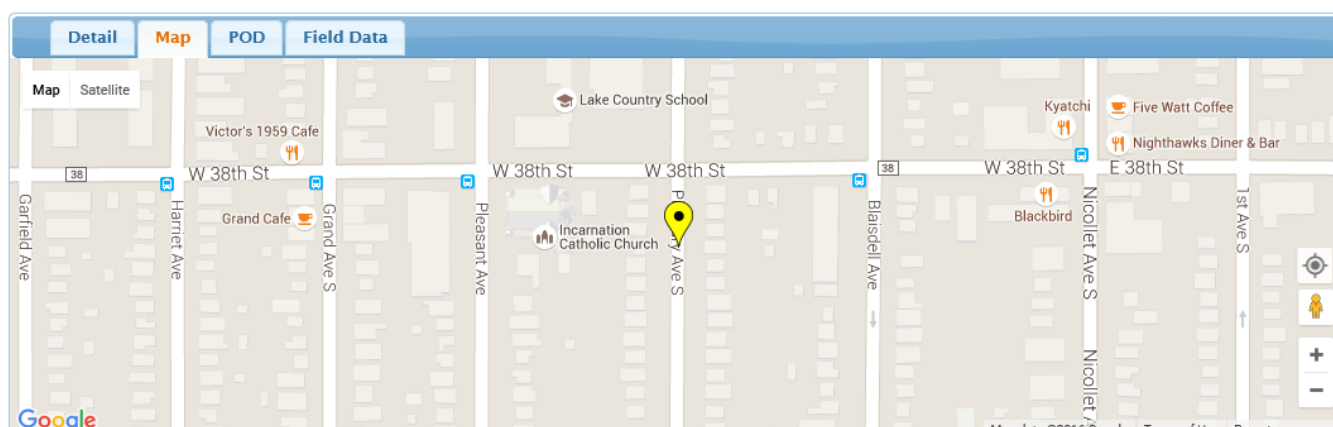


### Map

Displays the order location or the entire route containing the order on the map. The map will also display the truck's position and projected path only when the order is enroute to the customer's location.

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## POD

Displays the proof of delivery information sheet for assigned orders.

| Detail | Map | POD | Field Data |
|---|---|---|---|

| Order NO : | Delivery Date: 2016-06-14T13:43:24.337000000 |
|---|---|

| SHIP FROM | SHIP TO |
|---|---|
| Company: John Smith Auto | Company: |
| Address: Main St, Fredericton, NB, USA | Address: |
| Tel No: 234-567-8901 | Tel No: |
| Generated TW: - | Generated TW: |
| Orig Pickup: 4/15/2015 1:50:00 PM | Orig Pickup: |
| Picked up: 5/24/2015 4:33:11 PM | Picked up: |

| Item | Description | Total M1\|M2\|M3 | Quantity | Remarks |
|---|---|---|---|---|
| 1 | | 123 \| 5.5 \| _ | 1 | |
| - Detail 1 : 1 | | 1 \| 2 \| 2 | 1 | |
| NoProdType | | _ \| _ \| _ | 9 | |
| - Detail 1 : Apple | | _ \| _ \| _ | | |
| - Detail 2 : Orange | | _ \| _ \| _ | | |

## Field Data

Displays any associated field data (images, signatures, collected values, etc.)

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## Viewing and Editing Customers

Users can click a customer link in the Customer column to edit location details. This window allows users geocode, re-geocode, re-position or lock an address for a customer if necessary.



## Advise and Confirm

From the **Details** tab, users can perform an Advise call for to return time slots for routing orders. If an order is in "Completed" or equivalent status, the **Advise** button is disabled.

To return time slots for an order:

**1**   Select the order for which you want to return slots.

2   Select the desired order line items you wish to include by clicking the checkbox in the Advise column. Note that in this example, only one line item is selected.



3   Click **Advise**. The system returns a window with valid time slot options. These time slots are displayed based on the settings specified on the **Configuration** page.



4   Select one time slot and click **Confirm**. The order is saved with the time slot information and assigned to a route.

Since only one of the two line items was included in the Advise, the system splits the original order and creates a new order for the line item, which can be viewed in both Descartes Route Planner and in the **Order List** page of the Reservations and Visibility Portal.

# Reservations Configuration

From the **Configuration** page, administrator users can define threshold values that adjust how time slots are returned when the Advise and Confirm functionality is used.

## Defining Reservations Parameters

Administrator users will configure reservations settings on this page based on the score, profitability and availability of time slots.

- **Score:** The score value can be set to 1, 2, 3 or 4.
  - o **1:** Bottom 10 percent of profitability for all time window buckets
  - o **2:** Middle 80 percent of profitability for all time window buckets
  - o **3:** Top 10 percent of profitability for all time window buckets
  - o **4:** This value is only assigned when the configuration setting, "SameStopSlots", is equal to "1". In that case, the bucket will receive a score of "4" if the returned slot has a pre-existing job at the same location as the new job. In this case, the Advise call will allow the returned route to be infeasible.
- **Profitability:** The incremental profitability for any slot is the profit associated with the route after the new job is inserted at the slot minus the profitability of the route before the new job is inserted. Profitability is calculated as the sum of the 'revenue' for each job on the route minus the route costs. In general, the Advice call will look for a slot with minimum increase in driving costs for the new job. The profitability of the bucket is based on the MaxProfit configuration setting. If MaxProfit is set to "1", the profitability of the returned slot will be the profitability of the bucket. If MaxProfit is set to "0", the profitability of the returned slot will be the average profitability of all feasible slots for this time window.
- **Availability:** Availability is a count of distinct routes that could feasibly service the job during a given time window.

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## Configuration Screen Description

The **Configuration** page has five sections: Reservations Tabs, Reservations Thresholds, Economical Deliveries and Advise Calls Configuration.

**Reservations Thresholds/Economical Deliveries**

Administrator users can define thresholds based on the three criteria described above: score, profitability and availability. Time slots returned below the set values will not be displayed.



**Reservations Tabs**

Administrator users have two options in this section.



- **Use Incoming Order Time Window as slot reservations**
- **Use Slot Reservations:** Allows users to choose how tabs are displayed on the **Confirm** window after an Advise is performed. These tabs are dynamically generated from available bucket templates information.
    - ○ **Slot Type:** Displays time slot tabs delimited by slot type
    - ○ **Slot Time:** Displays time slot tabs delimited by the selected slot time

➲ **Note—** When time slots are used, "Size and Size Time Units" combination is taken into account. For example, if SizeTimeUnits is set to "2", time units are minutes. If SizeTimeUnits is set to "1", time units are hours.

### Advise Calls Configuration

In this section, administrator users can set a date range and an upper limit for time slots returned. Users can also enable or disable partial Advise calls.



### Delivery Charge

In this section, administrator users can configure delivery charges per slot time size.