



USER'S GUIDE

# Descartes® Route Planner™

## Reservations and Visibility Portal

May 2017

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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:

Select Language : English

**Login**

Company Name

Login Name

Password

Remember me ☐

Login

- 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.

DESCARTES Welcome fw-admin Log off

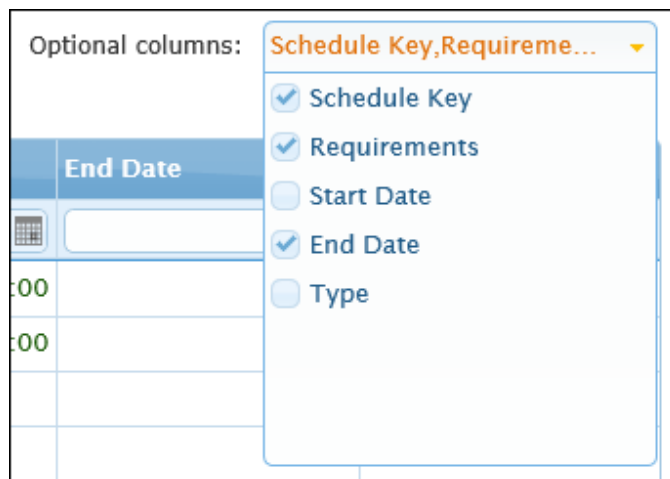
Home Configuration

Enter a text    Optional columns: WindowEarliestDate

Order	Customer	ETA	Start Date	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	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_111111x11	XML_016_TTCustomer1053			Pending
ZSV_Order_X_Test_111111111	XML_016_TTCustomer1053			Pending
ZSV_Order_X_Test_11111	XML_016_TTCustomer1053			Pending

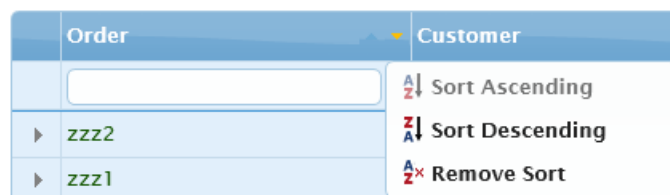
## Adding Columns

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.

Order	Customer
<input type="text"/>	<input type="text"/>
▶ <a href="#">zzz2</a>	<a href="#">Loc3</a>
▶ <a href="#">zzz1</a>	<a href="#">Loc2</a>
▶ <a href="#">zz54002zz</a>	<a href="#">Loc2</a>

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.

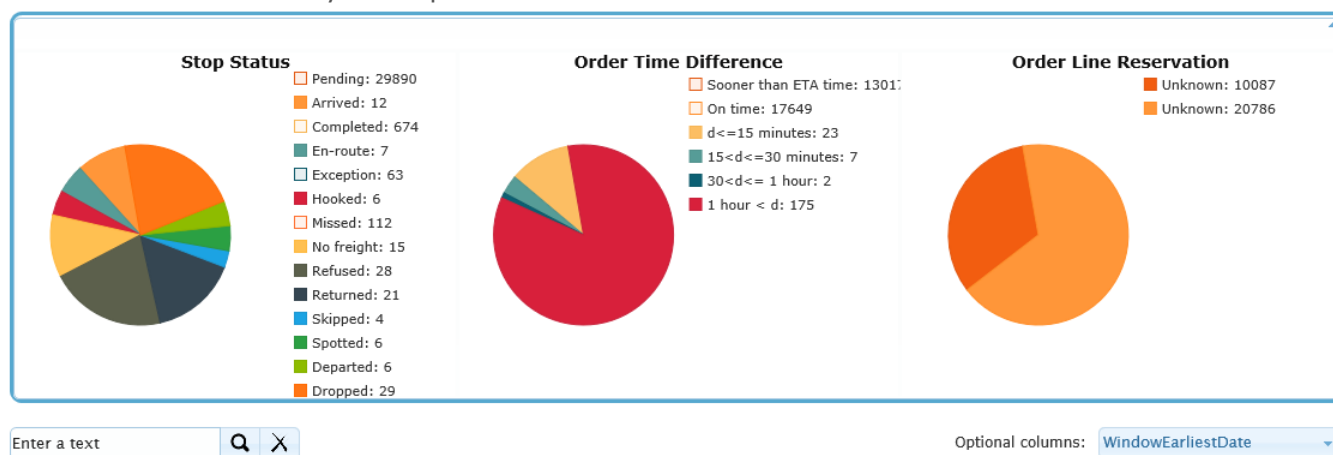
Order	Customer	Requirements	ScheduleKey	ETA	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	ROVReservations	<input type="text"/>	Select Filter
▶ Order-1640-10	<a href="#">Customer0622</a>		ROVReservations		
▶ Order-1640-12	<a href="#">Customer0622</a>		ROVReservations		
▶ Order-1640-13	<a href="#">Customer0622</a>		ROVReservations		
▶ Order-1640-15	<a href="#">ResCustomer0001</a>		ROVReservations		
▶ Order-1640-15	<a href="#">ResCustomer0005</a>		ROVReservations		
▶ Order-1640-15	<a href="#">ResCustomer0007</a>		ROVReservations		
▶ Order-1640-16	<a href="#">Customer0622</a>		ROVReservations		
▶ Order-1640-17	<a href="#">Customer0622</a>		ROVReservations		
▶ Order-1640-18	<a href="#">Customer0622</a>		ROVReservations		

October 2015						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7
Today Clear						

## 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"



Order	Customer	ETA	Start Date	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select Filter
▶ TW_Measures	<a href="#">14218_AVLCustomer1225</a>	2015-06-11T15:16:31		Pending
▶ #RET#_clone_it	<a href="#">13211_AVLCustomer1223</a>	2015-05-12T14:54:00		Missed
▶ #RET#_Order-2264-5	<a href="#">TT_Depot3</a>	2015-05-12T14:47:00		Missed

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.

## 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.

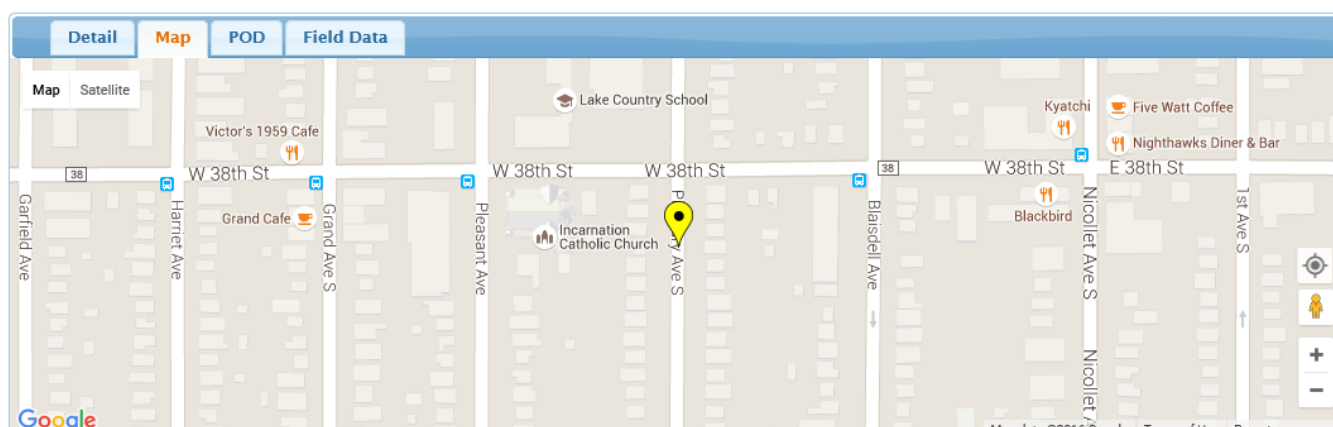
Stop ID	Customer	Status	Type	ETA
119502	BGCUSTOMER0585	Pending	Deliver	

Quantity	Item Description	Requirements	Measure	Reservation	Advise
1	Propane		121	Ready to ship	<input checked="" type="checkbox"/>

### 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.



**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 Address: Main St, Fredericton, NB, USA Tel No: 234-567-8901 Generated TW: - Orig Pickup: 4/15/2015 1:50:00 PM Picked up: 5/24/2015 4:33:11 PM		Company: Address: Tel No: Generated TW: Orig Pickup: Picked up:	
Item	Description	Total M1 M2 M3	Quantity
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.)

## 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.

Location Geocode

Geocode Save and Close

Geocode Results

Source

n7mn\_henne

Score

4500

Number

Street

EMERSON AVE S

Cross Street

CityStateZip

MINNEAPOLI

MN

55408

Country

US

LatLong

44.9384946

-93.2945757

LockLatLong

☐

Alternate Location

LatLong

Accept Alternate Location

Map Satellite

Map data ©2016 Google Terms of Use Report a map error

## 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.

Quantity	Item Description	Requirements	Measure	Status	Advise
7	chairs		3	Ready to ship	<input type="checkbox"/>
1	table		10	Ready to ship	<input checked="" type="checkbox"/>

- 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.

Select your date and time:

Gold Silver2 Bronze **Silver**

**Confirm**

Previous dates      **October**      Next dates

	Mon 12	Tue 13	Wed 14	Thu 15	Fri 16	Sat 17
08:00 - 12:00		<input checked="" type="checkbox"/>				
12:00 - 16:00		<input type="checkbox"/>				
16:00 - 20:00		<input type="checkbox"/>				

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

Route Detail   Row 1 - 1 of 1   < >							
Custom	Route ID	Resource Key	Name	↓ Territory	Total Measure	Dropoff	Total Mea
	7505	Resource-1639-4	Truck	TC3	19		0
<b>Stops</b>							
Custom	Stop ID	OrderKey	↑ Stop No	OriginalOrderKey	Party	Territory	RoutePositic Measure
	90724		0				
+	90766	Order-1640-13	1	Order-1640-13		TC3	4
+	90776	Order-1641-1	2	Order-1640-4		TC3	5
+	90777	Order-1642-1	3	Order-1642-1		TC3	10
	90725		4				

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.

Unassigned Stops

Customize
Reset
Filter
Auto Hide
+
-

Unassigned Stops | Row 1 - 11 of 11 |

Order ID	Type	OrderKey	OriginalOrderKey	Window Earliest
67279	Dropoff	Order-1646-1	Order-1642-1	11-OCT-2015

OrderLine

ProductKey	ProductName	ProductTypeKey	Product Type Name	Quantity	Unit
chairs				7	

Order	Customer	Requirements	ScheduleKey	ETA	Status
1646			ROVReservations		Select Filter
Order-1646-1	Customer0622		ROVReservations		Pending

Detail
Map
POD
Field Data

Advise

Quantity	Item Description	Requirements	Measure	Status	Advise
7	chairs		3	Ready to ship	<input checked="" type="checkbox"/>

## 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.
  - **1:** Bottom 10 percent of profitability for all time window buckets
  - **2:** Middle 80 percent of profitability for all time window buckets
  - **3:** Top 10 percent of profitability for all time window buckets
  - **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.



## Configuration Screen Description

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

DESCARTES
Welcome fw/fw-admin Log off

Home Configuration

### Reservations Tabs

☐ Use Incoming Order Time Window as slot reservations.

☒ Use Slot Reservations:

☐ Slot Type
 others

☒ Slot Time Size
 2 hours, 4 hours, 8 hours

### Reservations Thresholds

MIN Score
1

MIN Profitability
100

MIN Availability
1

### Economical Deliveries

MIN Score
1

MIN Profitability
100

MIN Availability
1

Select Color
#0AE806

### Advise Calls Configuration

Days to offer slots

Type
date Range

From
18-September-2016

To
23-October-2016

Max Number of Slots
10

Enable Advise on Partial Orders
☒

### Delivery Charge

Slot Time Size

2 hours
0

4 hours
0

8 hours
0

Save and Close Save

## 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

☐ Use Incoming Order Time Window as slot reservations.

☒ Use Slot Reservations:

☐ Slot Type

☒ Slot Time Size

2 hours, 5 hours, 10 hours

## Reservations Tabs

Administrator users have two options in this section.

### Reservations Thresholds

MIN Score 1

MIN Profitability 0

MIN Availability 0

### Economical Deliveries

MIN Score 1

MIN Profitability 0

MIN Availability 0

Select Color #0AE806

- **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.

**Advise Calls Configuration**

Days to offer slots

Type This Week

Max Number of Slots 50

Enable Advise on Partial Orders ☒

### Delivery Charge

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

**Delivery Charge**

Slot Time Size

2 hours	<input type="text" value="10"/>
4 hours	<input type="text" value="20"/>
8 hours	<input type="text" value="30"/>