

Routes and Route Plans

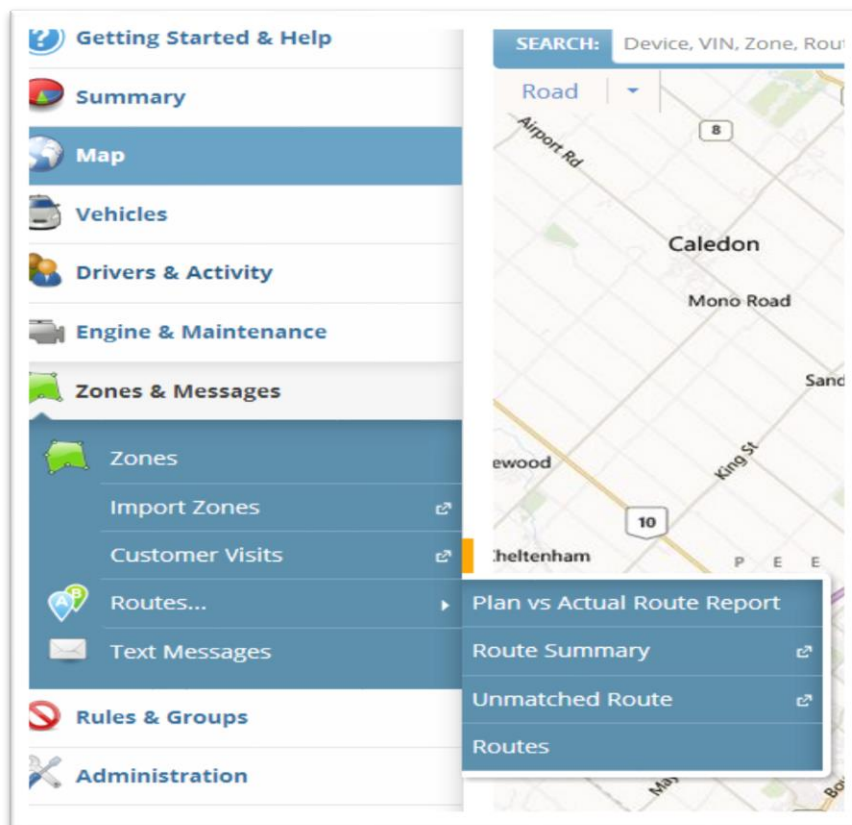
Definitions

Routes - A group of chosen zones looped together to define a route. (Zones must be entered prior to creating routes)

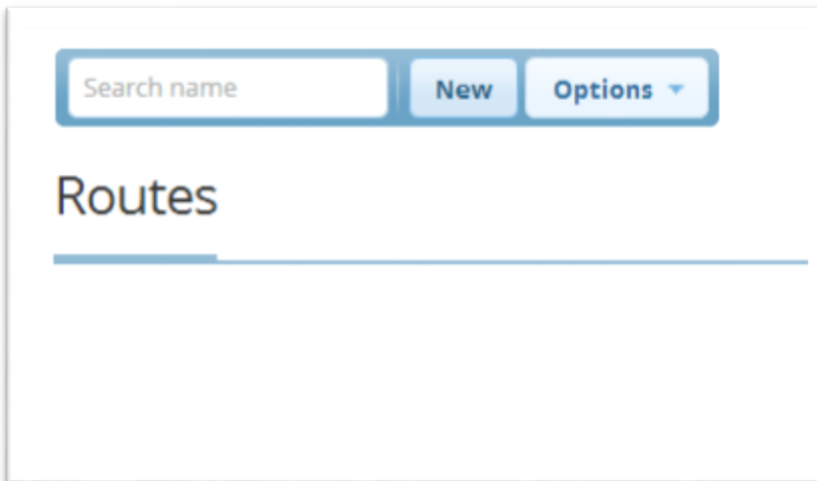
Route Plans - Taking those routes and adding a vehicle and timeframe to it, allowing for an Actual vs. Plan reporting capability.

Creating a Route

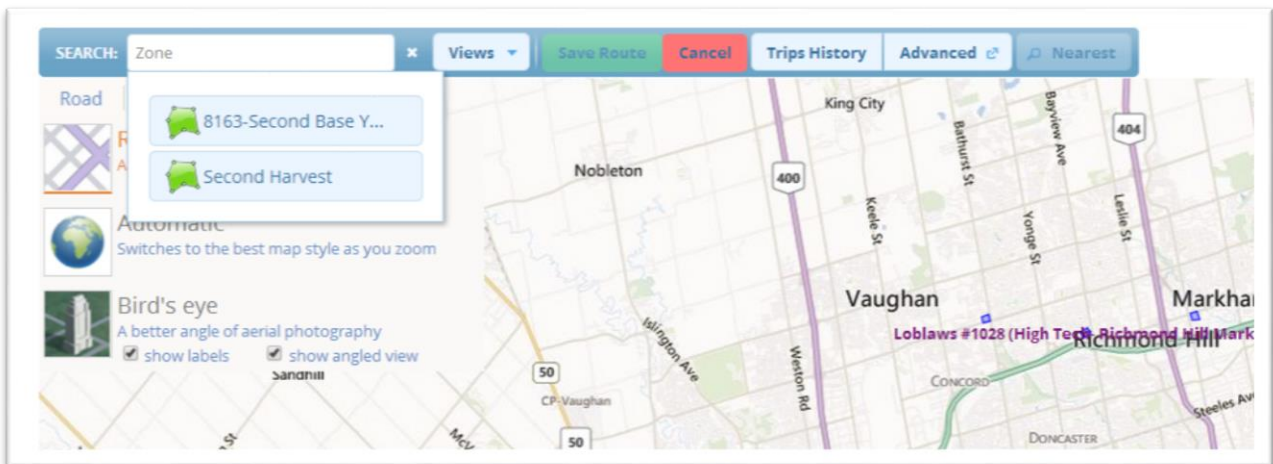
Click on Routes Then Routes again at the bottom of the list.



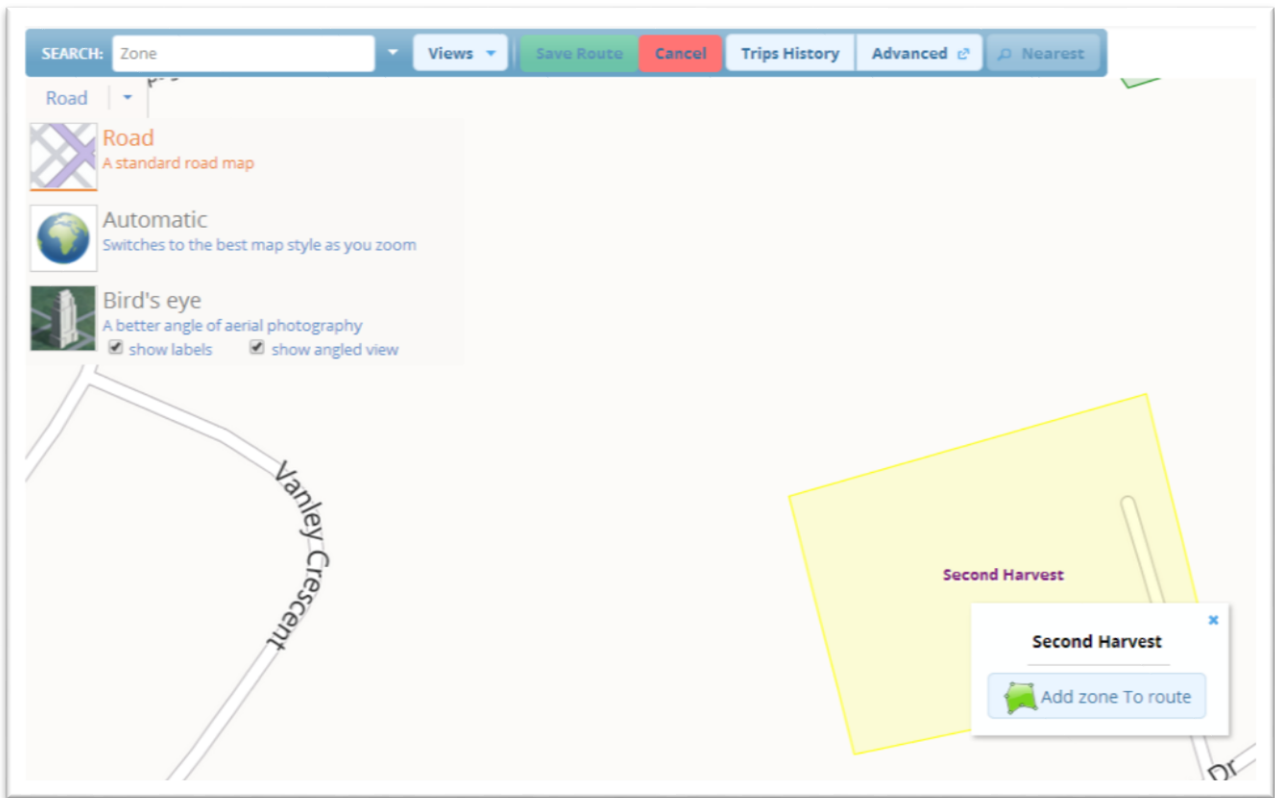
Then click on New and that will take you to the map to begin choosing the zones and creating your route.



Begin typing in the zone name and it will do a live search for that zone. You can also enter in an address, if no zone has been created and it will take you to that address on the map and allow you to add that address into the route as a Waypoint.



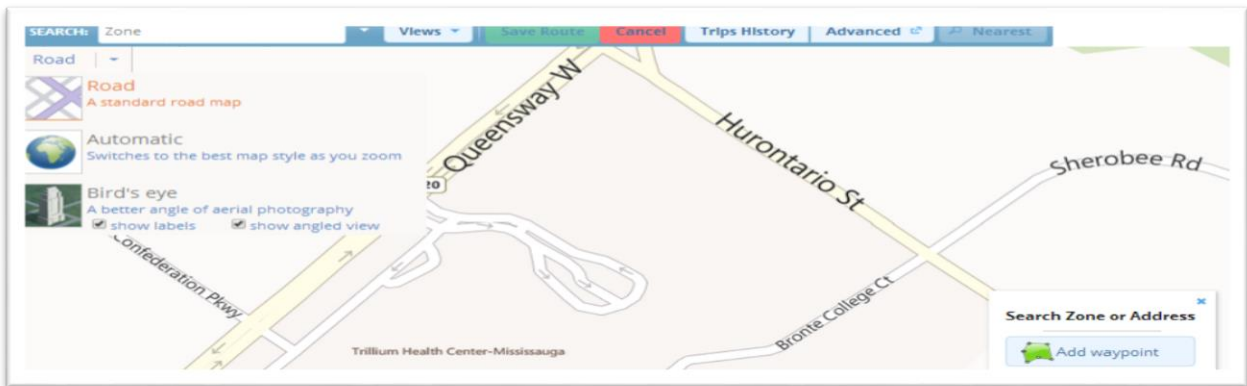
When you choose that zone or Waypoint it will take you to that spot on the map. Left click inside that zone and click on Add Zone to route.



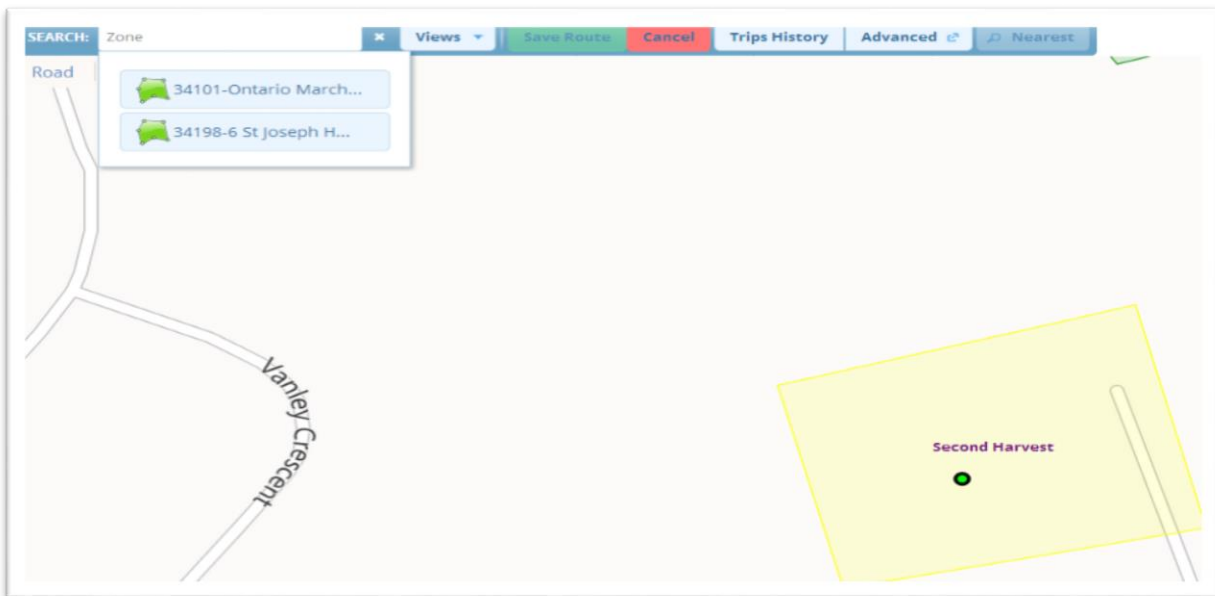
If searching by address it is adding a Waypoint to the route. When you click on Add Waypoint it drops a dot to that address on the map adding it to the route. It will create a zone automatically with the address being the name, you will see it added in the Zone List

GEOTAB

management by measurement



It will add a dot in the zone itself indicating that it has been added to the route. In this case it is a green dot indicating the first stop or the starting point of the route. Then repeat the process and search for the next zone for the route. Repeat to add every zone to the route.



The remainder of the zones will have a red dot in them and a line indicating the suggested route to drive.

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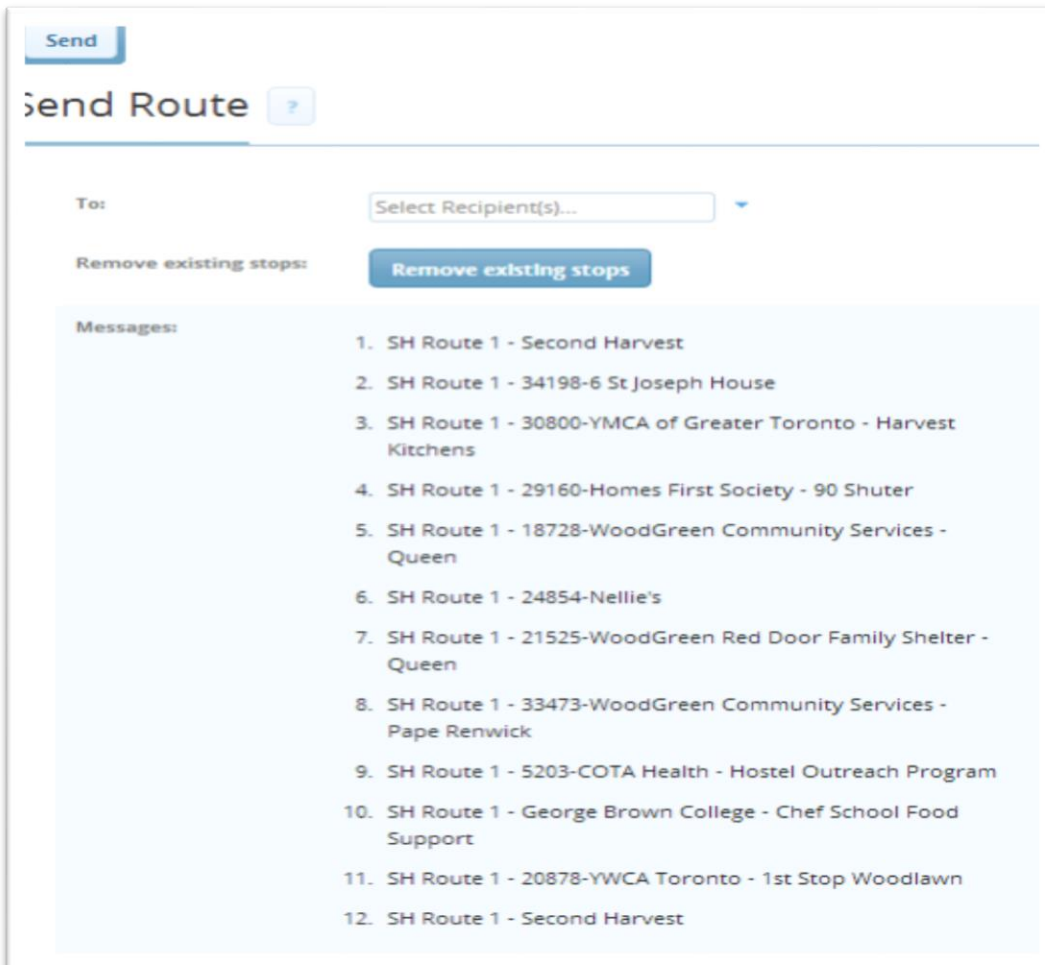
management by measurement



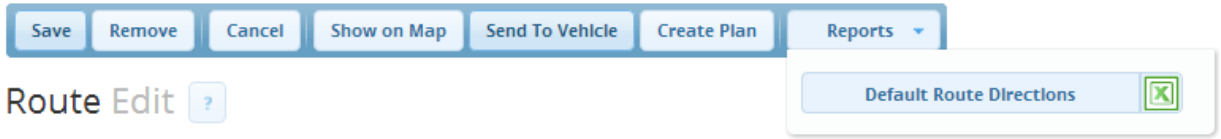
When all Zones have been added click on save and you will be taken to the Route Editor page where you will need to name it accordingly. Once you name it please Save again and it will be in the route list. You can also choose to Optimize at this point and our mapping will put the Zones in order of how to drive this most efficiently, this is optional.

Routes To Garmin

This is also the point where you can push this route to a vehicle if you have a Garmin installed. Simply click on Send to Vehicle and you will be prompted to choose a vehicle. You will also note that directions are included. Clicking on Remove Existing Stops will wipe the Garmin of any existing stops currently on the Garmin that is in the vehicle chosen for this route. You will also note that you can Create a Plan from any given route installed.



The option to flip the directions of the route into Excel is done by dropping the Reports button down in the Route Editor page. You can see that the directions will flip into Excel or PDF for printing and/or emailing to the driver.



Creating a Plan

Creating a plan will take a route and add a vehicle and timeframe to it and allow users to do Actual vs. Planned reporting. When you choose a route that has been entered please click on Create a Plan at the top and that will direct you to assign it to a vehicle and add the timeframe.

Simply choose the vehicle that will be driving the route in the Vehicle section and choose the date. Then adjust the time at zone.

The first time box is arrival time at the zone. The second box is the distance driven from previous stop. The third box is the time it takes to drive that distance from the previous address. And the final box is the time at customer which is usually adjusted by the user.

SaveRemoveCancelShow on MapSend To VehicleReports ▾

Route Edit ?

Description:

Comment:

Vehicle: ▾
Selected: None

Start Date:

To get directions, try running the Default Route Directions report.

Zones Organizer:

⚡ **Second Harvest** ✕

Vehicle parked here at route start.

⚡ **34198-6 St Joseph House** ✕

⚡ **30800-YMCA of Greater Toronto - Harvest Kitch** ✕

⚡ **29160-Homes First Society - 90 Shuter** ✕

⚡ **18728-WoodGreen Community Services - Queer** ✕

⚡ **24854-Nellie's** ✕

⚡ **21525-WoodGreen Red Door Family Shelter - Qu** ✕

Once the adjustments have been made click save and the route Plan will be saved with the chosen vehicle for the chosen day.

Save Remove Cancel Show on Map Send To Vehicle Reports

Route Edit

Description: SH Route 1

Comment:

Vehicle: Selected: SH 196 9XE R1

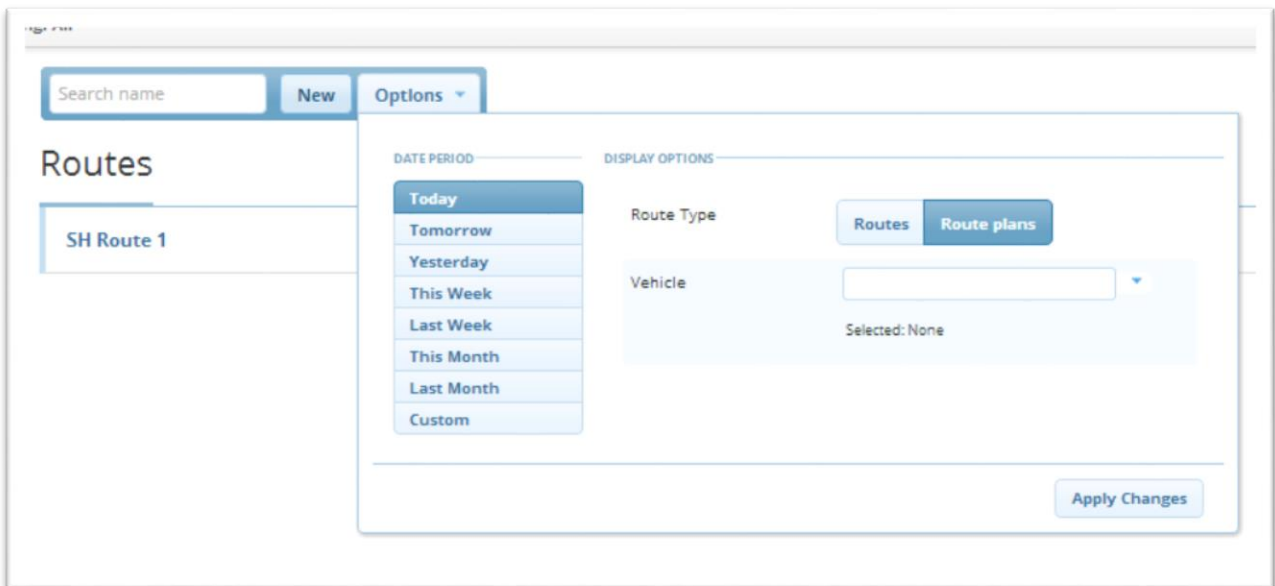
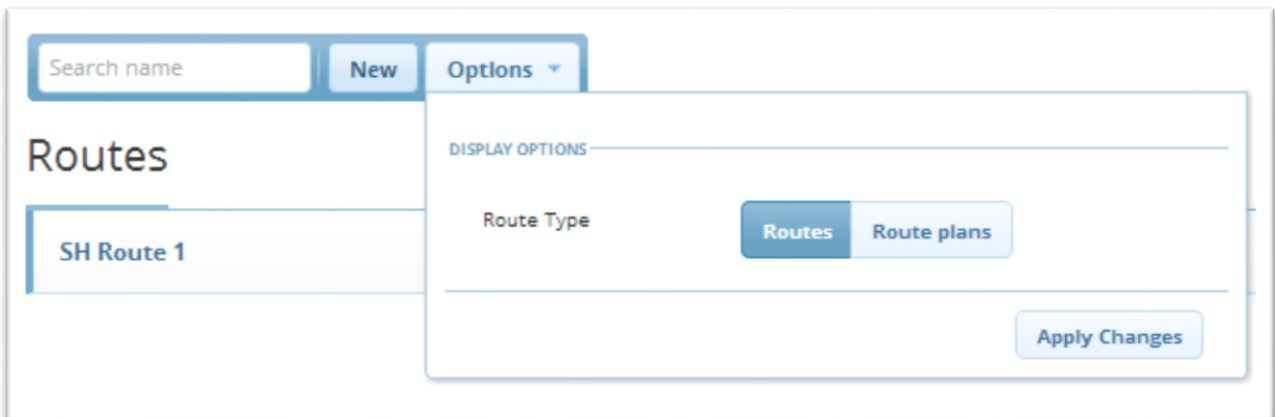
Start Date: 08/27/2013

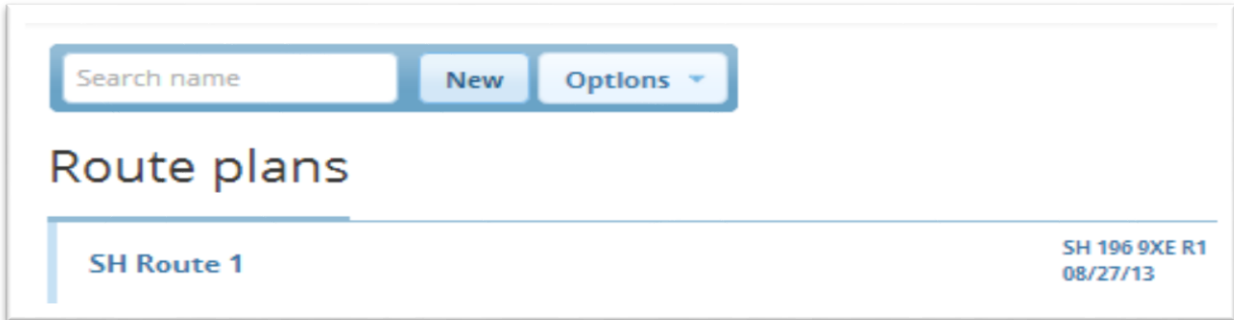
To get directions, try running the Default Route Directions report.

Zones Organizer:

- Second Harvest
08:00 Vehicle parked here at route start.
- 34198-6 St Joseph House
08:45 14.484 00:25 00:20
- 30800-YMCA of Greater Toronto - Harvest Kitch
09:18 3.2186 00:08 00:25
- 29160-Homes First Society - 90 Shuter
09:54 1.6093 00:06 00:30
- 18728-WoodGreen Community Services - Queer
10:24 1.6093 00:05 00:25
- 24854-Nellie's
10:45 0 00:01 00:20
- 21525-WoodGreen Red Door Family Shelter - Qu
11:16 0 00:01 00:30

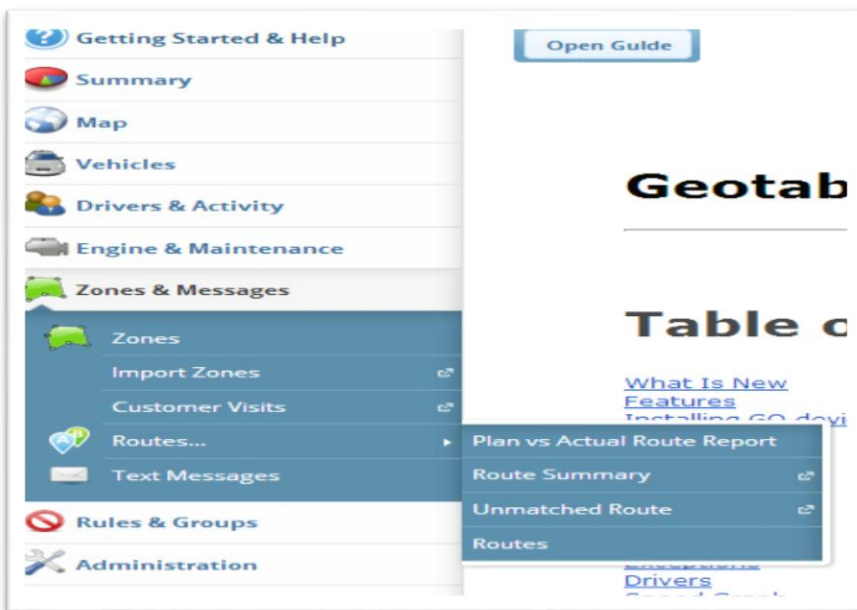
To search for a route plan click on Routes and click on Options then choose Route Plans. You will then be prompted to choose the time frame for the route you are looking to view. You can also be vehicle specific if you'd like. If you leave the vehicle blank all Route Plans for all vehicles will populate for the timeframe chosen. Then click Apply Changes and the Route Plans for the time frame will be listed.





Actual Vs. Planned Report

Under the Route section click on Plan vs. Actual Report.



You will be prompted to choose a vehicle then drop down the Options bar to choose the timeframe that you want to view.

The screenshot shows the Geotab Reports interface. On the left, there is a search bar and a list of vehicles. The main area displays a report for a specific vehicle, showing a list of stops with columns for date, time, duration, and distance.

Vehicle	Date	Time	Duration	Planned Distance	Actual Distance
SH 196 9XE R1	08/26/13	3:12 PM	16h 47m 22s	0mi	2m 31s
SH 254 6VH R6		8:01 AM	8m 39s	0mi	1m 41s
SH 655 0TR R5		9:23 AM	10m 35s	9mi	1h 14m 4s
SH 670 7TR SP		8:45 AM	20m	9mi	25m
SH 690 4MX R7		9:49 AM	21m 1s	3mi	15m 20s
SH 806 1VT R2		9:18 AM	25m	2mi	8m
SH 807 6ZV Van R9		10:26 AM	7m 24s	1mi	15m 16s
SH AA56968 R8		9:54 AM	30m	1mi	6m
SH AC63 842 R4		10:46 AM	6m 54s	2mi	12m 32s
SH AD24848 R3		10:24 AM	25m	1mi	5m
18728-WoodGreen Community...		10:56 AM	11m 10s	0mi	3m 26s
24854-Nellie's		11:14 AM	26m 28s	1mi	7m 25s
21525-WoodGreen Red Door F...		11:16 AM	30m	1mi	1m

When viewing the Actual vs. Planned in the User Interface you can clearly see the planned stops vs. the actual stops, the actual time arrived vs. the planned arrival time, the actual miles/KM's driven vs the planned. This particular report flips into excel beautifully.

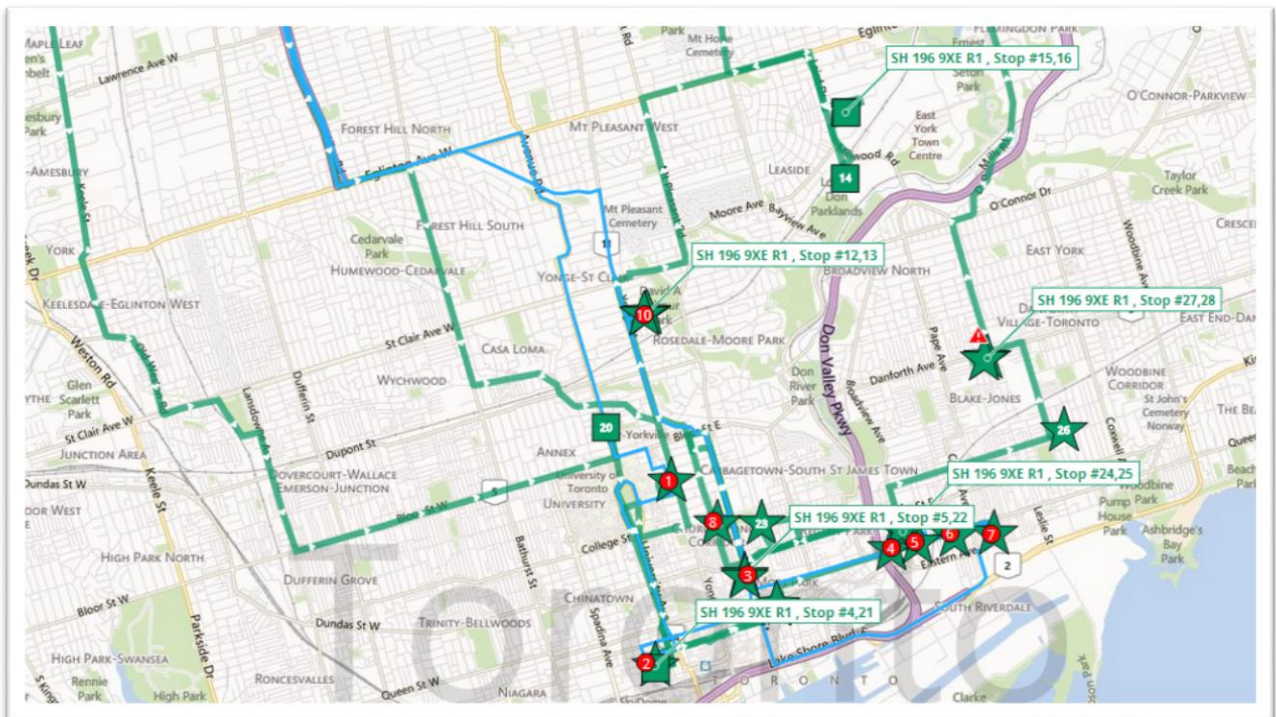
Tuesday, August 27 SH 196 9XE R1					
1	Second Harvest Steepprock Dr, Toronto, ON, M3J	08/26/13 3:12 PM 8:00 AM	16h 47m 22s	0mi	2m 31s
	Unexpected stop 1100 Lodestar Rd, North York, ON, M3J 2Z4	8:01 AM	8m 39s	0mi	1m 41s
2	34198-6 St Joseph House 6 St Joseph St, Toronto, ON, M4Y 1J7	9:23 AM 8:45 AM	10m 35s 20m	9mi 9mi	1h 14m 4s 25m
3	30800-YMCA of Greater Toront... Toronto, ON M5V	9:49 AM 9:18 AM	21m 1s 25m	3mi 2mi	15m 20s 8m
4	29160-Homes First Society - 90... 90 Shuter St, Toronto, ON, M5B 2K6	10:26 AM 9:54 AM	7m 24s 30m	1mi 1mi	15m 16s 6m
5	18728-WoodGreen Community... 650 Queen St E, Toronto, ON, M4M 1G5	10:46 AM 10:24 AM	6m 54s 25m	2mi 1mi	12m 32s 5m
6	24854-Nellie's 752 Queen St E, Toronto, ON, M4M 1H4	10:56 AM 10:45 AM	11m 10s 20m	0mi	3m 26s 1m
7	21525-WoodGreen Red Door F... Toronto, ON M4M	11:14 AM 11:16 AM	26m 28s 30m	1mi	7m 25s 1m
8	33473-WoodGreen Community... 8 Renwick Cres, Toronto, ON, M4M	11:46 AM 11:42 AM	11m 25s 25m	0mi	5m 3s 1m
9	5203-COTA Health - Hostel Out... 96 Granby St, Toronto, ON, M5B 1J1	12:18 PM 12:13 PM	5m 27s 20m	3mi 3mi	20m 34s 11m

The excel spreadsheet populates all of the above data wonderfully and adds this nice summary of data along the top.

Planned route time	start/end/duration	8:00:00 AM	4:58:00 AM	20:58
Miles	Expected/Actual/Difference	28.0	42.1	14.1
Drive Time	Expected/Actual/Difference	1:33	4:17	2:44
Customers	made/missed/unexpected	0	0	4

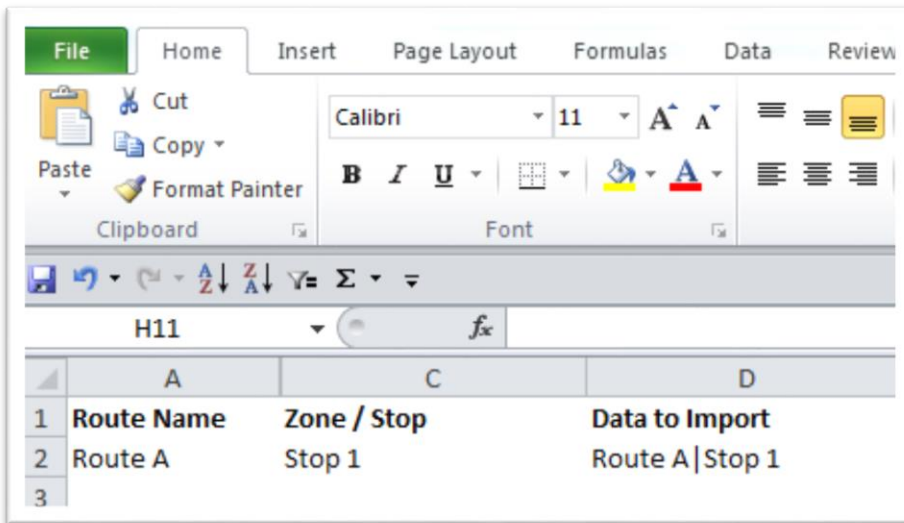
Actual Vs. Planned on the Map

At this point you can also populate the actual vs planned trips on a map. You will see the magnifying glass in the top right corner of the above report and that will populate the data on the map for a fantastic visual. The light blue route will always be the planned and the actual will always be any other colour – similar to that on the trips history map.

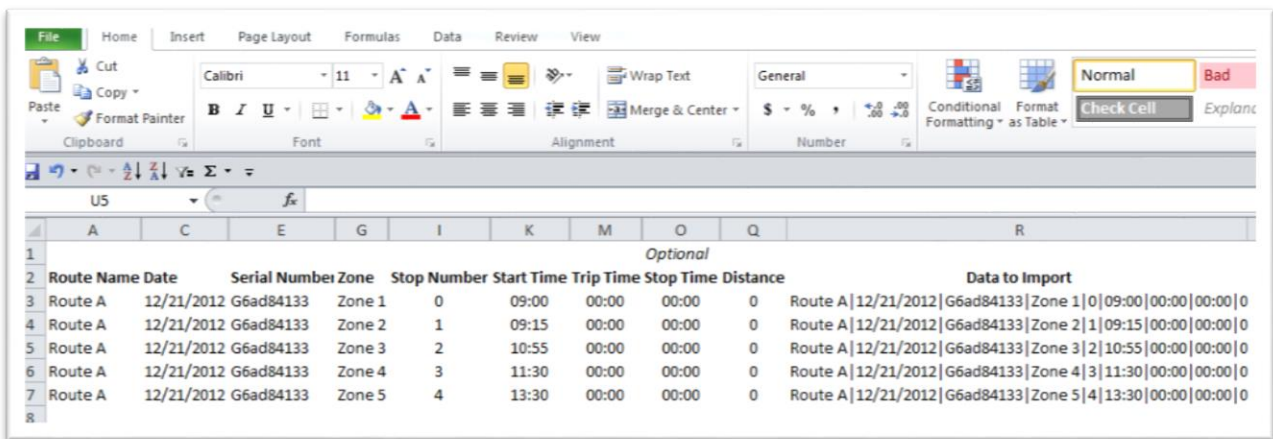


SDK Import

Route Import – below is an import template for routes. Simply fill out the template with the below information and follow the simple directions in the SDK to import multiple routes.

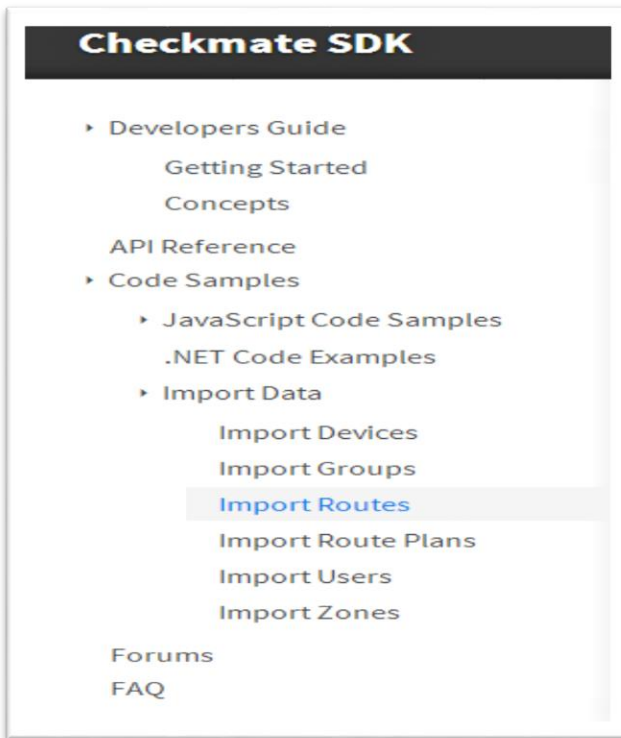


Route Plan Import – If importing Route Plans simply follow this template to import in bulk.



Importing Routes and/or Route Plans Using the SDK

My.geotab.com/sdk is the address for the existing SDK please keep in mind that it may change with the new release scheduled October/November 2013.



Drop down the Code Samples and you will see an Import Data tab. Please click on that Import Data. Then Click on Import Routes or Import Route Plans depending on your need. The process is the same for both it is just the excel spreadsheet that is configured differently.

When you've clicked on your task, you will be required to log into the database with your user access. You will be required to know the server number that the database is on.

Import Routes

This tool can be used to display routes and import new routes to a Checkmate installation. Please note that this example leverages pre-existing zones for route creation.

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SERVER DATABASE EMAIL PASSWORD

[Sign In](#)

Once you have logged in you simply copy and paste the list from the excel spreadsheet that has been configured already and click on the Import button below it to import.

Import Routes

This tool can be used to display routes and import new routes to a Checkmate installation. Please note that this example leverages pre-existing zones for route creation.

[Back to Main](#) [Show Source](#)

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Current Routes [Refresh List](#) **Import New Routes** [Help](#)

ROUTE NAME: SH Route 1	EXPECTED INPUT PER LINE: [routeName][ZoneName][Comment] (CLICK HELP IF UNCLEAR.)
ZONES:	ROUTES
ZONE NAME: Second Harvest STOP NUMBER: 1	Route A Stop 1 Route A Stop 1
ZONE NAME: 34198-6 St Joseph House STOP NUMBER: 2	
ZONE NAME: 30800-YMCA of Greater Toronto - Harvest Kitchens STOP NUMBER: 3	
ZONE NAME: 29160-Homes First Society - 90 Shuter STOP NUMBER: 4	

[Import](#)