



## Roadnet New Users Workshop Agenda

### Day 1: 9am – 5pm

#### **Introductions**

#### **Routing Theory**

- Elements of Successful Routing
- Strategic vs. Tactical
- Accountability & Responsibility
- Exercise

#### **Administration**

- Privileges
- Users/User Groups
- Regions
  - Cloning
- Security

#### **Maintenance**

- List Windows and Column Management
- Service Time Types
- Time Window Types
- Equipment Types
- Equipment
- Employee Types
- Employees
- Drivers
- Account Types
- Locations
- Exercise

#### **Day in Review**

### Day 2: 9am – 5pm

#### **Import Locations**

#### **Advanced Maintenance**

- Search Manager
  - Various Uses
  - Saved Searches
- Replace
- Printing List Windows
- Export Window

#### **Geocoding**

- Concept/Definition
- Batch Geocoding
- Interactive Geocoding
- Map Functions
  - Display Candidates
- Query By Address
- Exercise

#### **Standard Routing**

- Concept of Standard Routing
- Advantages/Disadvantages of Standard Routing
- Add, Modify and Delete a Route
- Add, Modify and Delete a Route Set
- Adding, Moving and Deleting Stops
  - Add Stop Function
  - Click and Drag
  - Suggest Route
- Standard Route Sequencing Options
- Pre and Post Route Stops
- Adding Breaks and Layovers
- Adding Mid-Route Depots
- Finding Locations
- Plotting Features
- Daily Standard Route Maintenance
- Save Standard Route Edits
- Exercise

#### **Day in Review**



## Day 3: 9am – 5pm

### Import Orders

- Manual Orders
- Multiple Sessions

### Creating a Standard Routing Pass

#### Daily Route Editor

- Introduction to the Following Functions:
  - Managing Windows & Columns
  - Finding Locations
  - Sequencing Routes
  - Time Window Routes
  - Combine Routes
  - Balance Routes
  - Moving Stops Using Route Window, Stop Window, and Map
  - Exceptions
  - Plotting Routes
  - Route Scrolling
  - Plot Info
  - Review of Map Functions
- Route Summary Window
- Unassigned Window
- Not Considered Orders
- Properties
- Suggest Route
- Adding Routes
- Deleting Routes
- Sequence a Range of Stops
- Re-geocoding
- Speed Assign Feature
- Assigning Sequential Route Number
- Assigning Breaks
- Assigning Helpers
- Adjusting Service Times
- Printing Driver Directions
- Exercise

### Saving Standard Routes & Standard Route Overrides

#### Send Orders

#### Day in Review

## Day 4: 9am – 4pm

### Dynamic Routing

- Concept of Dynamic Routing
- Advantages/Disadvantages of Dynamic Routing
- Creating a Dynamic Routing Pass
- Strategies of Dynamic Routing
- Standard Route Sequencing
- Preferred Route ID Routing
- Same Side of Street Routing

### Combined Routing

- Concept/Usage
- Advantages
- Creating a Combined Routing Pass

### Roadnet Reports

- Printing Reports
- Creating Report Groups

### RouteNet

- Concept and Calculations
- Selecting Streets
- Editing Attributes
- Adding Streets
- Adding Impasses
- Shortest Path Features
- Address Path Mode
- Update by Road Class
- Adding Global Penalties
- Assigning Penalties/Restrictions
- Disabling/Deleting Streets
- Exercise

### System Maintenance

- Tools – Options
  - Hours of Service
- Database Maintenance
- Archiving Routing Sessions
- Daily Backup

### Workshop Review

- Question and answer session
- Methods of Receiving Support

### Final Routing Exercise