



RouteSmart Work Area Planning Training

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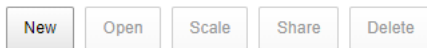
Preparing Your Workspace

Exploring the Workspace Manager

The Workspace Manager page displays all of the workspaces you have created. On the Workspace Manager page, you can create, open, scale, share, and delete your workspaces.

You can also see detailed information about the data used to create a workspace by clicking the + next to the workspace name to expand the workspace line in the table. This option lets you see detailed information like whether the workspace was scaled, the dates the workspace was created and last modified, the number of stops that were deleted, the dates included in the workspace, and so on.

Workspace Manager



Name	Station	Entity Name	Pl:
+ Training	Tutorial Station	WALTERS	Cu
+ Walters	Tutorial Station	WALTERS	Cu

Creating a New Workspace

The first step in modeling your work areas is to create a workspace. The workspace contains a set of service stops for one or more businesses for a chosen station. The workspace allows you to work with the data to perform tasks like removing stops, transferring stops to other work areas, and optimizing work areas.



1. Click the **Workspace Manager** icon on the left side of your screen.
2. On the Workspace Manager page, click **New** at the top.
3. Click the **Create New Work Areas** radio button on the **Create a new workspace** page.
4. On the progress list to the left, click **Station**.
5. On the **Stations** page you will see the station(s) for which you have access. If you have access to multiple stations, check the box next to the station you want to use. If you have access to one station, it will already be checked.

Note: You may choose only one station.

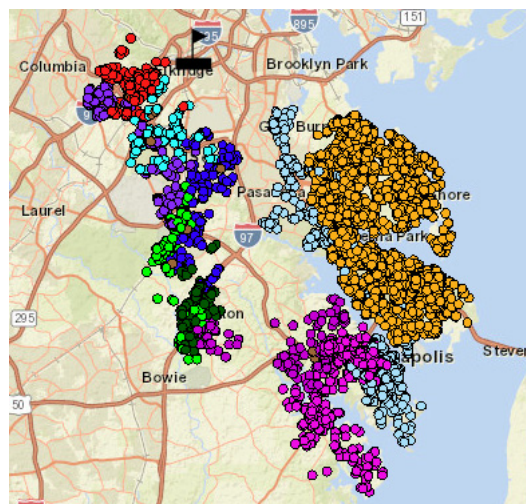
6. On the progress list to the left, click **Business**.

7. On the **Business** page, your Business name will be checked. You may choose additional businesses to include in your new workspace. You can also include all businesses by clicking the checkbox next to the **Business Name** header.
8. Click **Historical Data** on the progress list.
9. On the **Historical Data** page, use the month navigation arrows at the top to choose a month containing historical data you want to use.
10. Click each day of historical data you want to include in your new workspace. If you need to, you can click a day again to unselect it.

Note: Depending on the dates you choose, you may see a warning on the right side of the calendar about the days not being representative of each other. This message appears when the data on the selected days is uneven, whether in number of work areas or number of stops.

11. If applicable, click **Growth Rates** on the progress list. See **Adjusting Growth Rates** below for more information on growth rates.
12. Click **Summary** on the progress list. A summary of the data being used to create your new workspace will be displayed. Review this information—you can use the options on the left side menu to go back and make adjustments if necessary.
13. Click **Create**. On the window that opens, enter a name and a brief description of your new workspace and click **Save**. Your workspace will be created and will be displayed using the map view.

Note: If you have created a workspace containing work areas for multiple entities, you will see only your work areas displayed in different colors for each area on the map. The work areas for the other entities will be displayed in a single color on the map (each entity will be its own color--see the image below for an example). Some details like work area, sequence, and arrival time will also appear in your stop list as zeroes for the stops not in your work areas.



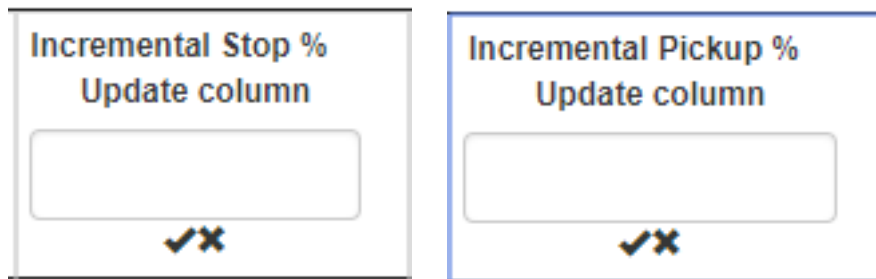
Adjusting Growth Rates

You may want to adjust growth rates when creating your workspace to model an increase in activity from the historical data you are using to create your workspace.

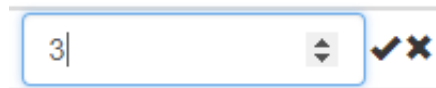
On the Growth Rates page, you can choose to adjust deliveries for Ground, deliveries for Home, deliveries for SmartPost, and/or pickups for Ground and Home combined. For each, you can adjust by percentage or stop count.

Note: For Peak Planning workspaces, percentage adjustments will already be set as defaults based on information provided by FedEx. For non-Peak workspaces, these percentages will not be provided.

1. On the **Growth Rates** page, review the **Existing Averages** for the postal codes in your workspace.
2. If you want to use the same percentage increase for all postal codes in any of the categories, click the **Edit** icon in the **Incremental Stop %** header for **Ground, Home Delivery, SmartPost**, and/or **Pickup**, and enter a percentage increase. Click the checkmark to save the change, or the **x** to discard.



3. To set individual increases, for each postal code, click the **Edit** icon for the field (either **Incremental Stop/Pickup %** or **Incremental Stops/Pickups**) you want to adjust. The field will become editable.



4. Use the editable field to adjust the deliveries and/or pickups. You may also type in the value you want to use.
5. Click the checkmark to save the change you made, or click the **X** to discard the change. If you are adjusting based on percentage, the stop count will be updated automatically, and vice-versa. Changed rates will be highlighted in green.
6. When you are finished adjusting growth rates, proceed to the workspace **Summary** page.

Creating a Peak Planning Workspace

The first step in modeling your work areas is to create a workspace. The workspace contains a set of service stops for one or more businesses for a chosen station. The workspace allows you to work with the data to perform tasks like removing stops, transferring stops to other work areas, and optimizing work areas.



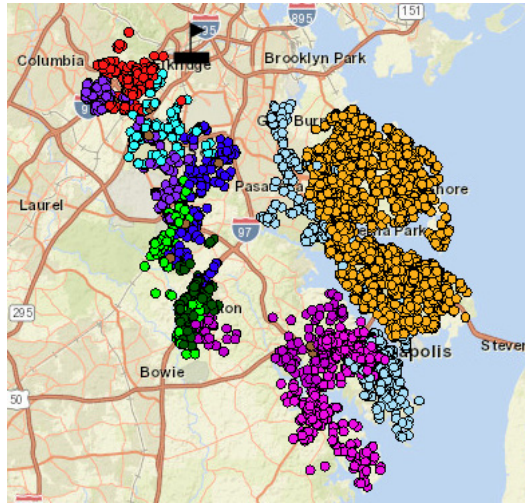
1. Click the **Workspace Manager** icon on the left side of your screen.
2. On the Workspace Manager page, click **New** at the top.
3. Click the **Plan for Peak** radio button on the **Create a new workspace** page.
4. Choose a day to plan for. You can choose any day.
5. Click **Station** on the progress list on the left side of the screen.
6. On the **Stations** page you will see the station(s) for which you have access. If you have access to multiple stations, check the box next to the station you want to use. If you have access to one station, it will already be checked.

Note: You may choose only one station.

7. On the progress list to the left, click **Business**.
8. On the **Business** page, your Business name will be checked. You may choose additional businesses to include in your new workspace. You can also include all businesses by clicking the checkbox next to the Business Name header.
9. Click **Historical Data** on the progress list.
10. Navigate in the calendar and choose a day of data to use for your workspace. You may choose only one day of historical data. If you want to choose a different day, you must unselect the selected day first.
11. When you have chosen the day you want to use, click **Growth Rates** (optional) or **Summary** on the progress list. If you choose Summary, proceed to step 15 below.
12. On the **Growth Rates** screen, you can adjust the rates of deliveries and pickups by percentage increase or number of stops. Rates may be increased per ZIP code. See **Adjusting Growth Rates** above for more information.
13. When you are finished adjusting **Growth Rates**, click **Summary** on the progress list.
14. The **Summary** page will show the details of the workspace you are creating, including the station, included businesses, historical data, and growth rates. Click **Create**. On the window that opens, enter a name and a brief description for your workspace and click **Save**. Your workspace will open in the map view.

Note: If you have created a workspace containing work areas for multiple entities, you will see only your work areas displayed in different colors for each area on the map. The work areas for the other entities will be displayed in a single color on the map (each entity will be its own color--see the image below for

an example). Some details like work area, sequence, and arrival time will also appear in your stop list as zeroes for the stops not in your work areas.



Opening a Workspace

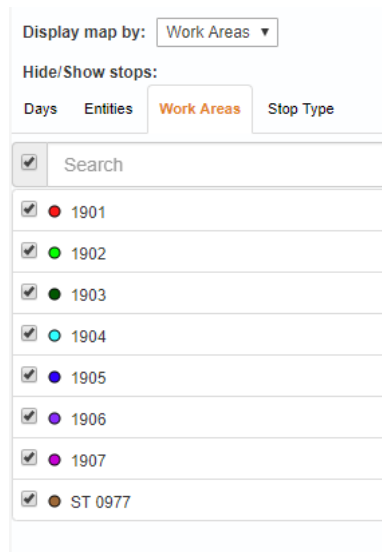


1. To open one of your workspaces, click the **Workspace Manager** icon on the left side of the screen.
2. On the **Workspace Manager** page, click the workspace you want to open. It will be highlighted in the list of workspaces.
3. Click **Open**. The workspace map view will open in the same tab.

Working with the Map

Exploring the Map View

After you create or open a workspace, your work areas will be shown on a map. To the left of the map are filters that you can use to hide or show stops on the map. There are a number of tools that allow you to navigate on the map and interact with your work areas.



Below the map is the Summary/Stop table. This table allows you to see information about your work areas in general (**Summary** tab) and about your stops in detail (**Stops** tab). The table also includes tools that allow you to change work area color and symbol, select by attributes, edit time windows (in baseline only), and update time and miles after making changes to your work areas. On the **Stops** tab, each column is sortable. You can click to select stops in the Stops list and they will be selected on the map. Use the **Ctrl** or **Shift** key to select multiple stops in the Stops list.

Summary		Stops										Selected: HD deliveries: 0 pickups: 0 GND deliveries: 0 pickups: 0 Total: 0			
	Work Areas	Days	Work Areas / Day	Total Hours	Hours / Work Area	Total Miles	Miles / Work Area	Stops	Stops / Work Area	Idle Time	Missed Windows				
As Delivered - Van	21	3	7	176.27	08:24	1377.94	65.62	2487	118.00	35:34	4				
As Delivered - ST	3	3	1	24.17	08:05	291.74	97.25	104	34.67	05:00	1				

Navigating on the Map



Info – Click the **Info** button and then click a location to see a popup with information about that location, including Name, Address, Work Area, Packages, PU/Del, and vehicle type. The Info tool will remain active until you click another tool. If there are multiple stops at the same location, you can use the navigation buttons on the popup window to scroll through them. The Info tool shows a circle around the stops in range of the point you identify, depending on zoom level.



Pan – Click the **Pan** button and then click and hold on the map to drag the map to the view you want.



Zoom In – Click the **Zoom In** button and click and draw a box around the area you want to zoom to.



Zoom Out – Click the **Zoom Out** button and click and draw a box to zoom out.

Note: You can also use the wheel on a mouse to zoom in and out on the map.

Using the Filter Tools

The filter tools allow you to hide and show stops on the map. Using these filters in various combinations allows you to show exactly the stops you want to see on the map. For instance, you can show only Home Delivery delivery stops on two work areas on one particular day by using the filters on the Stop Type, Work Area, and the Days tab in combination.

Display Map By dropdown box – allows you to choose whether to view your stops by work areas or Entities. The stops on the map will be colored by the type of display you choose.

Days – Use the **Days** tab to hide or show stops by day

Entities – Use the **Entities** tab to hide or show stops by Entity

Work Areas – Use the **Work Areas** tab to hide or show stops by work area

Stop Type – Use the **Stop Type** tab to hide or show stops by stop type (Home Delivery, Ground, SmartPost, Delivery, Pickup).

Using the Selection Tools on the Map



Select Stops – Click the **Select Stops** button and then click to draw a polygon on the map around the stops you want to select. Click each point of the polygon and then double-click to end the polygon. Each time you use this tool adds to the current selection. The Select Stops tool works on stops that are visible on the map. For the most part, stops that are not visible because of the filters you choose will not be selected (see note below for the exception).

Note: If there are multiple instances of a stop on the map, all instances of that stop will be selected when using the selection tools, even if some of the instances of that stop have been filtered off the map. This is done because all instances of a stop must be on the same work area, so when you use the selection tools to delete or transfer stops, all instances of that stop must be deleted or transferred.



Unselect Stops – Like the **Select Stops** tool, click the **Unselect Stops** button and then click to draw a polygon around a subset of selected stops that you want to unselect. The Unselect Stops tool works only on stops that are visible on the map. Any previously selected stops that are now not visible because of the filters you choose will remain selected.



Unselect All Stops – Click the **Unselect All Stops** to unselect all selected stops. The Unselect All Stops tool will unselect all stops, whether they are visible on the map or have been filtered.

Exploring Additional Map Tools



Switch Basemap – Click the **Switch Basemap** button to open the basemap selection options. Choose the basemap you want to use.



Postal Code Layer – Click the **Show Postal Code Layer** button to show postal code polygons on the map. Click the tool again to hide the Postal Code layer.



Sequence Layer – Click the **Show Sequence Layer** button to show the sequence line layer on the map. Click the tool again to hide the Sequence layer.

Note: "Dirty" work areas will not have a Sequence display. Additionally, a Sequence display may go to stops that have been filtered out from the map display.

Available in Baseline only:



Delete Selected Stops – Click the **Delete Selected Stops** button to delete the stops you have selected on the map. All occurrences of the stops on all days will be deleted.



Undo Delete – Click the **Undo Delete** button to undo the deletion of stops from the map. You can undo any deletes, one by one, made since the last time a solver (either Optimize or Update Time and Miles) was run.

Available in Solutions Only:



Transfer stop tool - Click the **Transfer stop tool** open the Transfer stop tool window. On this window you can transfer selected stops to another work area.



Assign work areas to entity - Click the **Assign work areas to entity** tool to open the Assign work areas to entity window. On this window you can assign work areas to entities.

Selecting by Attributes

The **Select by Attributes** tool allows you to choose the parameters you want to use to select stops in your workspace. The selection is additive, meaning that each time you select a group of stops, they will be added to the current selection instead of replacing it.



1. On the map view for your workspace, click the **Select by Attributes** button on the table below the map. The **Select stops by attributes** dialog will open.

Note: You can move this dialog to a location on your screen that allows you to use the tool and interact with the map at the same time.

2. On the **Select stops by attributes** dialog, use the dropdowns for **Day, Entity Name, Postal Code, Work Area, Network,** and **PU/DEL** to adjust the parameters for the stops you want to select.
3. If you want to perform the selection on all stops, even those that have been hidden based on the filters you have chosen, uncheck the box next to **Select from filtered stops** (enabled by default). The **Select by Attributes** window will remember your choice for this setting while you are in the current workspace.
4. Click **Select** to select the stops.
5. To create another selection, click **Reset** and then choose new selection parameters.

Viewing Selected Records in the Stop List

The stop list below the map lets you easily see and work with your stops. The stop list will show the stops currently displayed on the map. Any stops that have been hidden from the map based on the filters you choose will not be shown in the stop list.

1. Click the **Stops** tab on the table.

2. Use the selection tools (**Select Stops** or **Select by Attributes**) to select some stops in your area.



3. Click the **View selected only in table** button on the table below the map. You will see only your selected stops listed, highlighted in yellow. In addition, the stop detail information at the top of the table will reflect data for the selected stops

Note: If stops have been hidden from the map after being selected, the summary information on the stop list will still include the hidden stops.

Working with Work Areas

Your initial tasks in your Baseline solution will be to prepare your work areas before optimizing. This is an important data preparation step and will help ensure you get the results you want after optimizing your work areas. Data preparation tools like Delete and Undelete stops and Edit time windows are available only in your Baseline solution.

Deleting Stops on the Map

You may want to delete stops in your work areas if they should not be part of the analysis you want to perform.

1. Use the selection tools (Select Stops or Select by Attributes) to select the stop(s) you want to delete from your work area.



2. Click the **Delete selected stops** button in the map tools. Your stops will be deleted.



*Note: If you have deleted a stop by mistake, you can use the **Undo delete** button to undo the last delete action.*



3. After you delete stops, the Summary table will reflect that changes have been made. Use the **Update Time & Miles** button to update the work area information in the table.

*Note: You should use **Update Time & Miles** only when you are finished deleting all of the stops you want to delete. This is especially important because the **Undo Delete** tool will undo deletions only until the most recent solver (Optimize or Update Time & Miles) run. Using **Update Time & Miles** only when you are finished making all deletions provides you the ability to verify the changes you made and undo any deletions made in error.*

*Note: The **Delete Selected Stops** and **Undo Delete** tools are available only in the baseline for a workspace.*

Updating Time and Miles

After you have made changes to the stops on your map by deleting stops, you can use the **Update Time & Miles** tool to ensure your work areas are up to date.



After you are finished making changes, click the **Update Time & Miles** button on the table below the map. The time and mileage for your work areas will be updated.

Changing Work Area Color or Symbol

1. On the map view, click the **Change Color/Symbol** button on the summary table/stop list.
2. On the **Change Work Area Symbol** window that opens, click the **Work Area** dropdown to choose the work area you want to change.
3. Click the color button to open the color selection window.
4. Use the color selector to choose the color you want your work area to be. Click **OK**.

Note: Keep in mind that the selection color used on the map is yellow, so you should avoid using it for a work area color to avoid confusion.

5. On the **Change Work Area Symbol** window, use the **Shape** radio buttons to choose the shape you want to use for your work area.
6. When you are finished, click **Save**. The symbols for the work area you chose will be updated on the map.

*Note: If you want to revert your symbols to the original color and shape, click the **Reset** button on the **Change Work Area Symbol** window. All changes to colors and symbols you have made will be undone.*

Editing Time Windows

Note: The ability to edit time windows is available only in the baseline of a workspace.

1. On the map view for your workspace, use the selection tools (Select Stops, Select by Attributes, or select in the stop list) to select one or more stops to edit time windows.
2. Click the **Edit time windows** button on the table below the map.
3. On the **Edit time window** dialog that opens, enter the earliest and latest arrival times (based on a 24-hour clock) for the selected stop(s) and click **Save**. The time window information will be updated in the table for the selected stop(s). All copies of the stop will have the time window updated, even if not all of the instances of that stop are visible on the map.

Exploring Reports

*Note: CSPs will see only their work areas in the reports on this page, except in the **Postal Code** report and the **Entity Summary** report.*

The Reports page shows a number of reports about the work areas in your solution. At the top of the page, you will see the workspace name and description, solution name (if not in the Baseline), the station, and dates of service. Below that you will see the reports for the current solution.

Summary Report – Shows the number of work areas, days, work areas per day, as well other fields, grouped by work areas delivered by van and by truck in the baseline, and as suggested in solutions.

Work Area Summary – Shows time details, stop information, and package count information for each work area.

Day Summary – Shows number of work areas, time, miles, stop count, and package count information for each day in the solution.

All Work Areas – Shows the date, network, hours, miles, stop count details, package count details, and window for each work area. This report lists each day within the work area separately.

Postal Code – Shows stops and package information for pickups and deliveries, as well as number of Home stops/packages and Ground stops/packages, and SmartPost stops/packages for each postal code

Missed Time Windows – Shows a list of missed time windows sorted by day (most recent first) and details the CSA, network, address, postal code, work area, sequence, time window information, and stop time information for each missed window.

Summary by Entity – Shows details on the deliveries, packages, work areas, and percentage of workspace for each business/entity in the solution.

Note: CSPs will not see the percentage of the workspace for other entities in the workspace.

Optimizing Work Areas and Working with Solutions

Optimizing Your Work Area



1. Click the **Optimize Work Areas** icon on the left side of the Map/Solution Manager view. The Optimize Work Areas dialog will open.
2. Assign a name to your solution. A solution is saved each time you run a solver in your workspace baseline. If you are optimizing your work area in a solution, you can choose to create a new solution or overwrite the existing one.
3. Enter a brief description of your solution. This description can make it easier to determine which solutions you want to use later.
4. In the **Create** section, choose whether you are creating work areas based on time per work area or work areas per day.

*Note: You will not be able to choose **Work Areas per day** if the **Optimize Within Assigned Entity Service Areas** box is checked.*

5. In the **Balance** section, check the boxes for the settings you want to use to balance work areas in your workspace:
 - **Optimize Within Assigned Entity Service Areas** – This setting will optimize work areas only in your assigned entity service areas. If you have work areas for multiple entities in your workspace, and want to optimize all work areas and then assign work areas to entities after optimizing, leave this setting unchecked.
 - **Group Stops by postal code** – This setting allows you to control when all stops in a zip code must be included in the same work area.

*Note: If **Optimize Within Assigned Entity Service Areas** is unchecked and you then check it, your creation method will revert back to **Time**.*

6. Use the **Time/Compactness** slider bar to indicate your preference: to balance more on time, more on compactness, or leave it in the middle to consider both equally.
7. Enter the **Start time** for your work areas.
8. You can use the **Max delayed start time** setting to indicate that the start time for your work areas may be delayed up to the time you indicate, if the delay will minimize wait time (on a work area by work area basis).

9. If you want to set a capacity for your work areas, check the box next to **Limit work areas by** and then click the dropdown to choose whether you area limiting by Packages, Stops, or Time.
 - **Packages** - Enter the number of packages allowed per work area.
 - **Stops** - Enter the number of stops allowed per work area.
 - **Time** - Enter the time in HH:MM format allowed per work area.
10. Choose whether you want to include breaks on your work areas. Enter the break duration, earliest time, and latest time.
11. Choose whether you want to receive a notification email (at the email address in My Settings) when optimization is complete.
12. Click **Go** to optimize your work areas. When your optimization is complete, you will see a notice on the screen letting you know that your new solution has been created, and giving you the option to open the new solution.

Learning about Solutions

A solution is saved—either a new solution or an update to an existing solution—each time you run a solver on the Optimize Work Area page. This process ensures that each time you make adjustments to your work area, the information is saved.

The Solutions page displays a list of the solutions in your workspace, including the Baseline solution, which is the original state of your workspace. On the Solutions page, you can select any solution and open, delete, copy, or export it.

Note: The Baseline solution may not be deleted.

Opening a Solution





1. On the **Solutions** page, click the solution you want to open in the solutions list.
2. Click **Open**. The solution will open in a new tab on the map view.

Using the Transfer Stop Tool

The Transfer Stop tool allows you to move stops from one work area to another, or to create a new work area to which you want to move stops. This tool is available in solutions only.

Note: If you want to use the Transfer Stop tool on your Baseline solution data without running Optimize—for example, if you know you need to make only small changes and do not want the solver to


optimize your work areas—you can create a copy of the Baseline solution and use the Transfer Stop tool in the copy.

1. In the map view for your solution, use the selection tools to select the stops you want to transfer.
-  2. Click the **Transfer stop tool** button on the map. The **Transfer stop tool** window will open.
3. Click the dropdown box to choose the destination work area to which you are transferring your stops.
4. Click **Transfer**. The stops you selected will be transferred to the work area you chose.
5. To create a new work area, click **New** on the **Transfer stop tool** window. On the **Add work area** window that opens, assign your new work area a name and choose the vehicle type. Click **OK**. Your new work area will be displayed in the destination work area dropdown.
6. Follow the process above to transfer your stops to the new work area.
7. When you are finished transferring stops, close the **Transfer stop tool** window.
-  8. Use the **Update Time & Miles** tool to update the information on your work areas.

Assigning Work Areas to an Entity

The Assign Work Areas to entity tool is ideal for workspaces with multiple CSPs, and allows you to exchange and reassign work areas with other entities to improve your overall territory. This tool is available in non-Baseline solutions.

*Note: You may want to choose to display your map by **Entities** when using this tool. You can turn on the Sequence display to get an idea of where your work areas are while assigning work areas to entities.*

-  1. In the map view for your solution, click the **Assign work areas to entity** button. The **Assign work areas to entity** window will open. You can move this window on your screen so it is not in the way of you viewing your work areas.
2. If you want to create a new entity to which you will assign work areas, click **New** at the bottom of the **Assign work areas to entity** window. Name your new entity and click **OK**. Your new entity will appear in the **Destination Entity** dropdown box.
3. Click the **Destination Entity** dropdown and choose the entity to which you want to assign work areas.
4. Click one of the stops in a work area that you want to assign to your destination entity. All of the stops in that work area will be selected, and that work area will be listed under selected work areas.

Note: If you need to remove a work area from the list of selected, click the x next to the work area name.

5. When you have selected all the work areas you want to assign, click **Transfer**. The selected work areas will be assigned to the entity you chose.

Exporting and Printing

Exporting a Solution



1. On the **Solutions** page, click the solution you want to export in the solutions list.
2. Click **Export**.
3. The solution will be exported as a .csv file and will be downloaded according to your browser settings.

Exporting Reports



1. Open the workspace and solution that have the reports you want to export.
2. Click the **View Reports** icon on the left. The reports for your solution will open in a new tab.



3. On the reports page, click the **Export Reports** icon at the top right of the screen.
4. On the **Export Reports** dialog that opens, choose the reports you want to export. By default, all reports are checked.
5. When you have chosen the reports you want, click **Export**. The reports will be exported as individual .csv files and will be downloaded according to your browser settings.

Printing Your Map

Use the navigation tools to arrange your map the way you want to see it on the printed version. You should choose to hide or show the stops you want on the final map.



1. Click the **Print Map** icon on the left side menu. The RouteSmart Work Area Planning application will generate a pdf of your map and it will be downloaded according to your browser settings. The map will show the work areas you chose as well as information about the station, CSA/PSA, Solution name, and days of data in the workspace.
2. Use your browser tools to download or print the map.

Advanced

Scaling a Workspace

Scaling a workspace lets you use a copy of an existing workspace and add stops to model an increase in volume.



1. On the **Workspace Manager** page, click the workspace you want to use.
2. Click **Scale**.

Note: You may not be able to scale some of the workspaces because the workspaces were already scaled (either at workspace creation or later).

3. On the **Scale an existing workspace** page, choose whether you want to define growth rates, upload a .csv file of stop locations to add, or plan for SmartPost volume.

Defining Growth Rates



1. Click **Define growth rates**.
2. Click **Growth Rates** on the left.
3. On the **Growth Rates** page, review the **Existing Averages** for the postal codes in your workspace.
4. For each postal code, click the **Edit** icon for the field you want to adjust. The field will become editable.
5. Use the editable field to adjust the deliveries and/or pickups.
6. Click the checkmark to save the change you made. If you are adjusting based on percentage, the stop count will be updated automatically, and vice-versa. Changed rates will be highlighted in green.
7. Click **Summary** on the left.
8. Review the information on the **Summary** screen and click **Scale**.
9. Enter a name and brief description on the dialog that opens. You may want to reference the source workspace you used.
10. Click **Save**. Your scaled workspace will be created.

Uploading a .csv File

Creating an Upload File

You must create a file of additional addresses if you want to scale a workspace using an upload file.

1. Use a program like Microsoft Excel that allows you to create a comma separated values (csv) file.
2. In the Excel file, create field headers named:
 - **address** - address of the stop you are adding. Required.
 - **city** - city of the stop you are adding. Optional.
 - **state** - state of the stop you are adding. Optional.
 - **postal_code** - postal code of the stop you are adding. Recommended.
 - **latitude** - latitude coordinate of the stop. Optional.
 - **longitude** - longitude coordinate of the stop. Optional.
 - **pd_del_flag** - the type of service the stop will receive. Accepted values are PICKUP or DELIVERY. Required.
 - **earliest_arrival** - the earliest time the stop can receive service. Optional.
 - **latest_arrival** - the latest time a stop can receive service. Optional.
 - **packages** - the number of packages at the stop. If you do not have provide a number of packages, the default of 1 will be used.

Note: Coordinate data is good to have, but not required. Stops without coordinate data will be address matched and placed on the map.

3. After you create the necessary fields, create an entry for each address you want to add to the scaled workspace, filling in the appropriate information in each field.
4. When you are finished adding stops, save your file as a .csv extension and proceed to the directions below.

Uploading the File

1. Click **Upload stop locations**.
2. Click the **File** button. A navigation window will open, allowing you to choose the file you want to upload.
3. Choose the file you want to upload and click **OK**.
4. Click **Summary** on the progress list. The Summary page will show information about your workspace and will list the file you are uploading.
5. Click **Scale**.
6. On the **Scale Workspace** window that opens, enter a name and brief description. You may want to reference the source workspace you used.

7. Click **Save**. Your scaled workspace will be created.

Planning for SmartPost Volume

This scaling option allows you to add SmartPost volume to an existing workspace. This option will incrementally add SmartPost stops that were planned to be delivered on the days in the workspace you are scaling.

1. Click **Plan for SmartPost Volume**.
2. Click **Summary**. The summary page will show information about your workspace: how many of each type of stop is currently in the workspace, how many SmartPost stops are being added, and the new total number of stops.
3. Click **Scale**.
4. On the **Scale Workspace** window that opens, enter a name and brief description. You may want to reference the source workspace you used.
5. Click **Save**. Your workspace will be created.

Assigning Helper/Jumper Areas

*Note: The **Assign Helper/Jumper areas** tool is available only in optimized solutions or copies of your Baseline solution. If you do not have either, you can go to the Workspace Manager and make a copy of your Baseline solution or use the **Optimize** tool on the map to create a solution.*

You can use the Assign Helper/Jumper areas tool to model Helper/Jumper routes in WAP.

On a **Helper** route, a driver has a helper that is dropped off or met that delivers packages independent of the driver. WAP allows you to designate a dropoff/pickup location for the helpers. The tool allows you to create one or more polygons for the areas the helpers will service.

On a **Jumper** route, a driver has a helper that delivers packages for part of or the entire route. The driver and helper are always together when traveling to stops. The service time for each stop will be reduced for any route that is designated as a Jumper route, or stops that are within a Jumper polygon on a route.

Creating Helper Areas

1. Choose the work area you want to assign as a **Helper** route. It may be helpful to hide other work areas on the map so you can clearly see the stops on your chosen work area. You may also want to zoom to the area you want to select.



2. Click the **Assign Helper/Jumper areas** button.
3. Choose the work area you are using from the **Work area** dropdown.

4. Choose **Helper** from the **Area type** dropdown.
5. Enter a description for the Helper area you are creating.
6. Click **Draw Helper Area** to designate the part of the work area that is the Helper area.
7. Click on the map and draw a polygon around the locations you want to include. Double-click to finish drawing the polygon.
8. Choose a **Start and End Location**. The dropdown will display all of the stops in the polygon you drew. If the number of stops is too large, click **Filter list** and draw a polygon on the map around the stop you want to use as the **Start and End Location**. Choose that stop from the dropdown.
9. Enter the number of helpers for this area.
10. Enter the arrival time (HH:MM) for the area.
11. If the driver will **drop off the helper and not return**, click **Save**.
12. If the driver will **stay with the helper in the area**, click the checkbox for **Driver stays and leaves at** and then click **Save**. The time automatically provided is an estimate, and you may edit it if you want.
13. If the driver will **drop off and pick up the Helper**, click the checkbox for **Vehicle returns at** and then click **Save**. The time automatically provided is an estimate, and you may edit it if you want.
14. If you want the rest of the stops on the route to be serviced as **Jumper** stops, click the checkbox for **Use jumper for remaining stops on route**.
15. When you are finished, you will see the polygon on the map around the area you selected, and you will see a flag icon at your **Start and End Location**.

Creating Jumper Areas

1. Choose the work area you want to assign as a **Jumper** route. If you plan to assign part of a work area, it may be helpful to hide other work areas on the map so you can clearly see the stops on your chosen work area. You may also want to zoom to the area you want to select.



2. Click the **Assign Helper/Jumper areas** button.
3. Choose the work area you are using from the **Work area** dropdown.
4. Choose **Jumper** from the **Area type** dropdown.
5. Enter a description for the Jumper area you are creating.

At this point, you can choose to designate the full route as a Jumper route, or part of the route.

6. To use the **full route**: Click the checkbox next to **Full Route** and click **Save**.

7. To select part of the route: Click **Draw and Save**. On the map, click to draw a polygon around the stops you want to indicate as Jumper stops for the route. Double-click to finish drawing the polygon.
8. The symbols on the map will change to hollow to indicate they are Jumper stops. If you drew a polygon, you will also see that on the map.



*Note: You will see that the summary table information is out of date after the Jumper route is assigned. Use the **Update Time and Miles** tool to refresh the summary information.*

Viewing and Refining Helper/Jumper Areas in the Summary Table

You will see your Helper and Jumper areas on the **Helpers/Jumpers** tab on the Summary table below the map.

For **Jumper** routes you will see the work area number, the area type, description, and whether it is the full route. The rest of the fields in the table are for Helper routes.

For **Helper** routes, you will see the work area name, area type, description, whether the driver stays, if the remainder of the route is jumper stops, the number of helpers, the address of the Start/End Location, the start time, estimated service time, and end time (if the driver returns for the helper).

Editing a Polygon



1. To edit any of the polygons on a Helper or Jumper route (not Full Route), click the **Redraw Area** button in the first column of the table for the area you want to change. The map will shift to that polygon and the points of the polygon will be movable.
2. Drag the points of the polygon to edit the shape. Click one of the white dots to add another vertex to refine the shape.
3. When you are finished, click the **Redraw Area** button again, now a checkmark. Any new locations in the edited polygon will be changed to the hollow symbology.

Editing Area Attributes



1. To edit the attributes of one of the areas, click the **Edit Attributes** button.
2. For **Jumper** areas you can edit the description field.
3. For **Helper** areas, you can edit all information except the work area and area type.
4. Click **Update** when you are finished making changes. Your edits will be displayed in the table.


Deleting an Area



1. To delete an area, click the **Delete Area** button.

2. A confirmation window will be displayed, listing the area you chose. Click **Delete** to delete it or **Cancel** to go back to the table.

Updating Service Time

 To update the Service Time for an area, click the **Update Service Time** button.

Viewing Helper/Jumper Polygons on the Map

You can use the **Show Helper/Jumper areas** tool to display the Helper/Jumper polygons on your map.

*Note: The **Show Helper/Jumper areas** tool is available only in optimized solutions or copies of your Baseline solution. If you do not have either, you can go to the Workspace Manager and make a copy of your Baseline solution or use the Optimize tool on the map to create a solution.*

1. Use the **Workspace Manager** to open the workspace containing the work areas you want to view.



2. Click the **Solutions** button on the left side of the screen to go to the Solution Manager.
3. Choose an optimized solution or copy of your Baseline.
4. On the map page, click the **Show Helper/Jumper areas** button. Your Helper/Jumper areas will be displayed.
5. Click the button again to hide them if you want.

Maintenance

My Settings

The **My Settings** window allows you to enter your preferred email address used when you receive notifications in RouteSmart Work Area Planning. On this window, you can also choose when you receive notifications: when a solver completes and/or when a workspace is shared with you.



1. Click the **My Settings** icon at the top of any screen. The My Settings window will open.
2. Enter the email address you want to use in the **Email Address** field.
3. Check the boxes next to **Optimization complete** and/or **Workspace shared** to choose the types of notifications you want to receive.

Note: If you do not choose to receive notices when Optimization is complete, you will not receive notices, even if you choose to send an email upon completion on the Optimize work areas window.

4. Click **Save** when you are finished.

Editing a Workspace Name

When you create a workspace, you enter a name for the workspace. If you need to edit the workspace name, you can easily do so on the Workspace Manager page.



1. Click the **Workspace Manager** icon on the left side of the screen.
2. Hover over the workspace you want to edit and click the **Edit** icon that appears in the Name section. The **Name** field will become editable.
3. Make the changes you want to the workspace name and click the checkmark to save the changes.

Editing a Workspace Description

When you create a workspace, you have the option to add a description for the workspace. If you need to edit the workspace description, you can easily do so on the Workspace Manager page.



1. Click the **Workspace Manager** icon on the left side of the screen.
2. Hover over the workspace you want to edit and click the **Edit** icon that appears in the **Description** section. The Description field will become editable.



3. Make the changes you want to the workspace description and click the checkmark to save the changes.

Sharing a Workspace

Sharing a workspace allows you to send one of your workspaces to another user. A copy of the workspace will appear in their workspaces list and they can interact with the workspace as they need to.



1. Click the **Workspace Manager** icon on the left side of the screen.
2. Click to highlight the workspace you want to share. You can share one workspace at a time.
3. Click **Share**.
4. On the **Share Workspace** window that opens, click the **User** box and choose the user with whom you want to share your workspace. You can start typing their User ID/email address and the dropdown will be filtered to help you find the user you want. You can choose more than one person to share your workspace with.

Note: You will see only other CSPs at the same station or FedEx employees in the list of available people with whom you can share your workspace.

5. Use the **Comment** field to add comments about the workspace you are sharing.
6. Click **OK** to share the workspace or click **Cancel** to go back to the Workspace Manager. After you click **OK**, the user(s) you have chosen will receive an email notification that you have shared a workspace. The shared workspace will appear in their Workspace Manager list when they log in.

Deleting a Workspace

You may want to delete a workspace if it is out of date or you no longer need it.



1. Click the **Workspace Manager** icon on the left side menu.
2. Click to highlight the workspace(s) you want to delete on the Workspace Manager page. You may choose more than one workspace to delete.
3. Click **Delete**.
4. A window will open, listing the workspaces you chose to delete and asking you to confirm the deletion. Click **Delete** to complete the deletion (or **Cancel** to go back to the Workspace Manager). Your workspace will be deleted.

Copying a Solution

You may want to copy a solution because you have your data in a good place and optimized, and want to model a different scenario but you do not want to optimize your work areas again to create a solution. You may also want to make a copy so you can make those changes to your work areas while preserving the current state of your solution.

If you copy the Baseline solution, the time and mileage in the copy may be different from the original. The RouteSmart Work Area Planning application sequences your existing work areas behind the scenes as it creates a copy of a solution. Making a copy of your Baseline solution gives you the ability to use the **Transfer stop tool** and the **Assign work areas to entity** tool in the Baseline copy, which are not available when viewing your regular Baseline solution.

Note: You may only create a copy of the Baseline solution if it contains only your work areas. If the workspace contains data from other entities as well, you will not be able to copy the Baseline.



1. On the **Solutions** page, click the solution you want to copy in the solutions list.
2. Click **Copy**. A copy of your solution, with the name "Copy of <solution name>," will be added to the solutions list.

Note: You can edit the name and/or description of the solution copy if you want.

Editing a Solution Name

You may want to edit the name of a solution to correct an error or to make the solution name more meaningful. For example, when you copy a solution, the new solution name will automatically be listed as "Copy of <original solution name>." You may find it useful to edit the name of the copy to something that provides more information about the solution.



1. On the **Solutions** page, hover over the solution name you want to change in the solutions list.



2. Click the **Edit** icon that appears in the **Name** field. The name will become editable.

Note: You may not edit the Baseline solution name.



3. Enter the new name for your solution and click the checkmark to save.

Editing a Solution Description

You may want to edit a solution description if you need to correct an error or want to add or remove

information about the solution.



1. On the **Solutions** page, hover over the solution description you want to change in the solutions list.



2. Click the **Edit** icon that appears in the **Description** field. The description will become editable.

Note: You may not edit the Baseline solution description.



3. Enter the new description for your solution and click the checkmark to save.

Deleting a Solution

You may decide to delete a solution if it is out of date or you no longer need it.



1. On the **Solutions** page, click the solution you want to delete in the solutions list. You can choose multiple solutions to delete.

2. Click **Delete**.

3. A message will open, listing the solutions you have chosen and asking you to confirm deleting the solution. Click **Delete** to proceed.