

Route Exclusion Periods

Last Modified on 04/03/2024 3:01 pm EDT

An Exclusion Period for a route is a beneficial feature to accommodate driver's time off for vacation and holidays, office meetings, and/or upcoming inclement weather conditions. The *Exclusions* tab maintains each route's specific Exclusion Periods. It contains the list of exclusions, information pertaining to the selected period, and a calendar to display a visual representation of the Exclusion Periods.

Note the following:

- Exclusion periods are **not** supported in Summer Fill mode.
- Specific Call-In Delivery dates are **not** supported during Exclusion Periods.
- Tank Groups are supported during Exclusion Periods.

Rules

- **One-time Route Exclusion Period** – The Optimizer+ reviews all tanks to see which ones may potentially be eligible for delivery during the Excluded Dates. Any qualifying tanks will be scheduled across the delivery period, with the start of the period front-loaded with schedules. If there is not a backlog of tanks requiring deliveries or tanks that are defined as critical to the Optimizer+, the route should successfully Park for the Exclusion Days.

If a Delivery Period is set up over a weekend, the Optimizer+ will continue to make an effort to push deliveries to Friday and Monday, however it is quite possible to see schedules occur on the weekend.

- **Automatic Exclusion Periods** – Work similarly to *One-time Route Exclusion Periods*, however a recurrence frequency is established, and they are universally applied to all Optimizer+ routes.

The Optimizer's success in adhering to Exclusion Periods relies on requests being of a short duration and a small number of periods used during the season. For some routes, excluding one schedule day may create a backlog of near empty tanks that is difficult to recover. Such recoveries are dependent on excess delivery capacity which will vary between routes and the time for which an exclusion is requested.

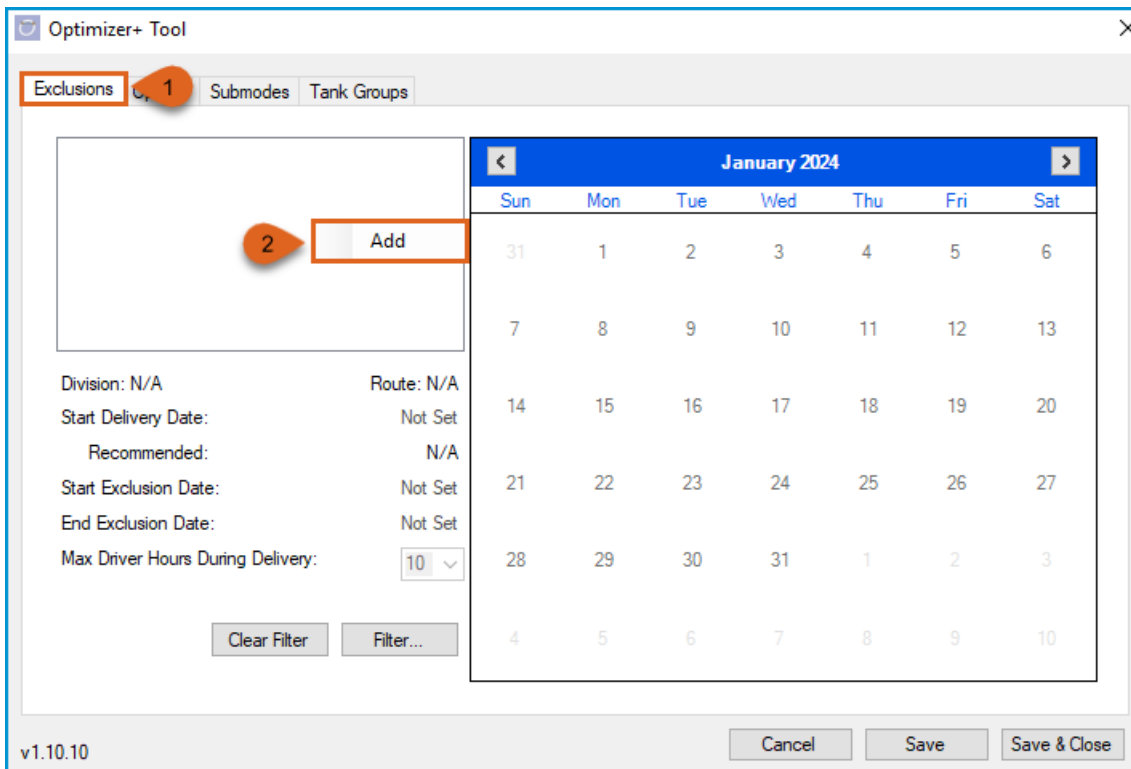
Note: Use this capability sparingly. The more the Optimizer's flexibility to choose tanks is restricted, the poorer the quality of schedules will become. If used to excess, exclusion scheduling may create unrecoverable tank backlogs and produce run out situations.

Warnings:

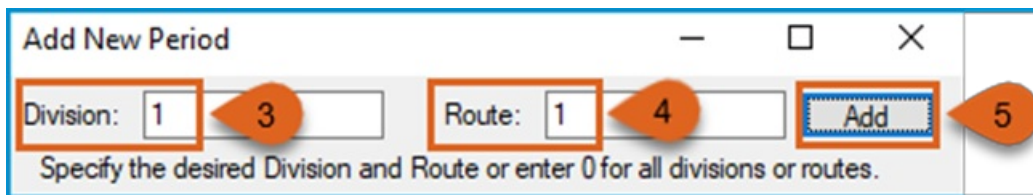
- An exclusion period setup for more than a total of 8 days will be ignored by the Optimizer.
- An excessive delivery period in comparison to the duration of the Excluded day(s) may result in tanks getting scheduled at high levels in the first few days of the period.

Adding an Exclusion Period

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool* .



1. Click on the **Exclusions** tab.
2. Right-click in the white box and select **Add** from the pop-up menu.



3. Enter the *Division*.
4. Enter the *Route*.
5. Click **Add**.

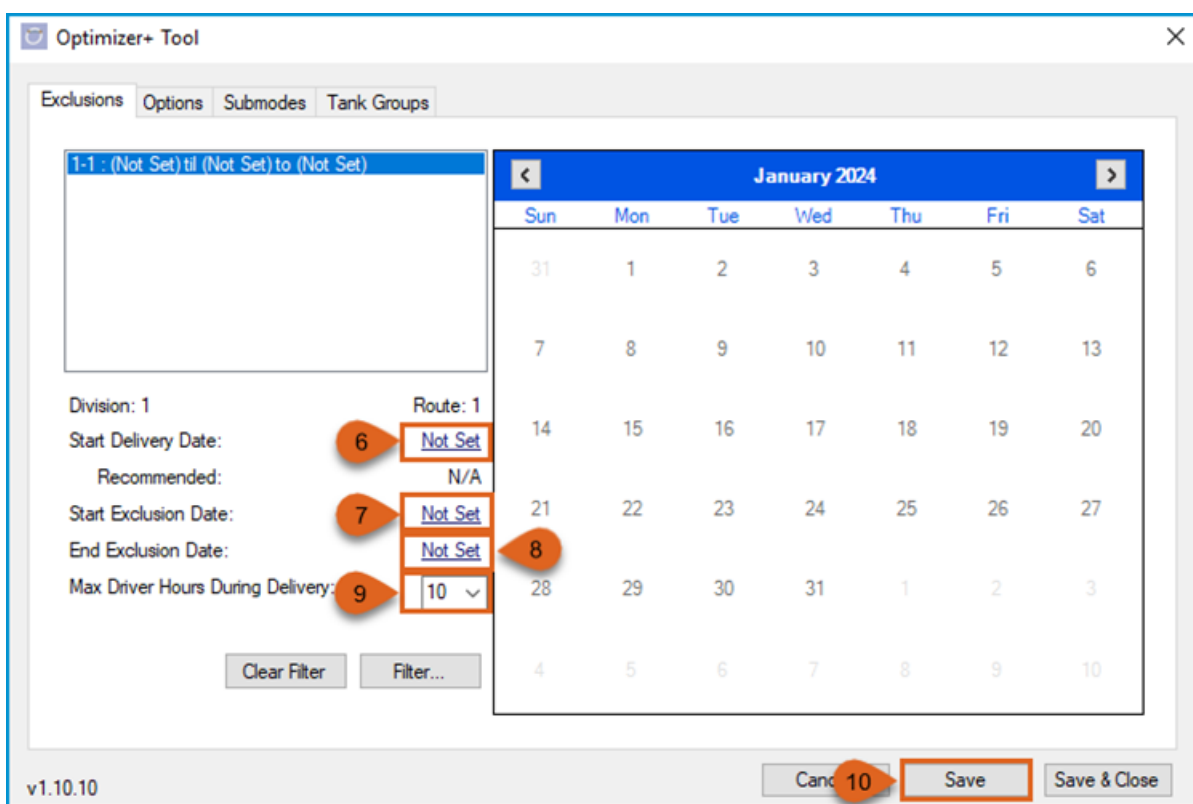
Note: Combinations of commas and dashes may be used to specify multiple divisions or routes. For example, entering 1-3,5,8 in the *Route* field means routes 1, 2, 3, 5, and 8 will follow the Exclusion Period created. Entering a '0' for the *Division* and *Route* will create a period that applies to all Optimizer+ routes.



6. Click on **Not Set** for *Start Delivery Date* and using the calendar to the right, select the start of the delivery period.

7. Click on **Not Set** for *Start Exclusion Date* and using the calendar to the right, select the starting date for the route exclusion period. (Start of Parked Date)
8. Click on **Not Set** for *End Exclusion Date* and using the calendar to the right, select the ending date for the route exclusion period. (End of Parked Date)
9. From the drop-down menu, select the *Max Driver Hours During Delivery* value to define the maximum allowed duration of the schedule
10. Click **Save** or **Save & Close** if no other changes need to be made in the Optimizer+ Calendar Tool.

Note: All dates are required for a valid Exclusion. Any dates listed as **Not Set** indicates that a specific date has not been assigned, therefore that exclusion is invalid and the Optimizer+ will not use the period until all dates are entered.



Viewing an Exclusion Period

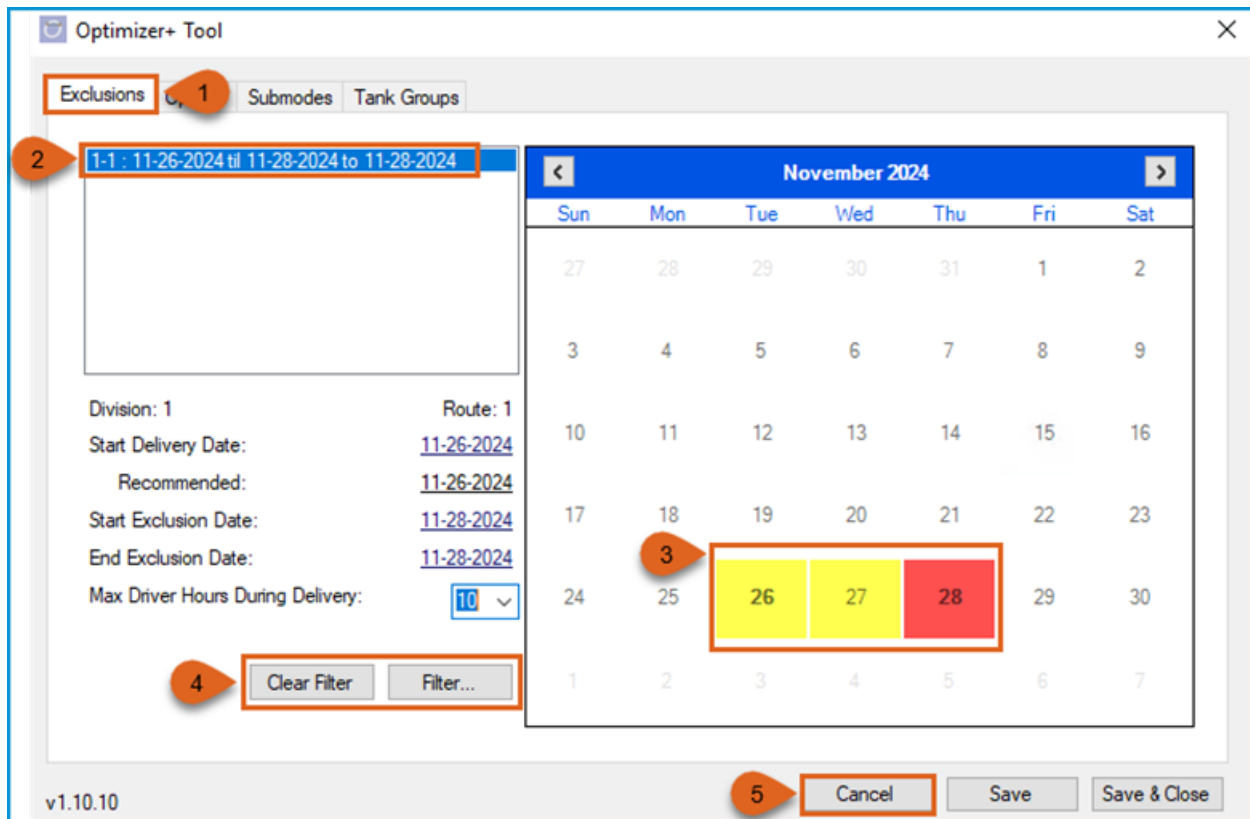
Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool*.

1. Select the *Exclusions* tab.
2. The box will display the *Div-Route : Start Delivery Date til Start Exclusion Date to End Exclusion Date*.
3. The yellow dates will indicate the Delivery Days for the Exclusion Period and the red date(s) will show the day(s) of the Route Exclusion Period.

For example: The exclusion is set up for Division 1 – Route 1. It is set to *park* the route on November 28th, using the 26th and 27th as the delivery days. The Optimizer+ can build a schedule up to 10 hours long on those 2 delivery days.

4. **Clear Filter** and **Filter...** buttons can be used to search for exclusions by Divisions and/or Routes.

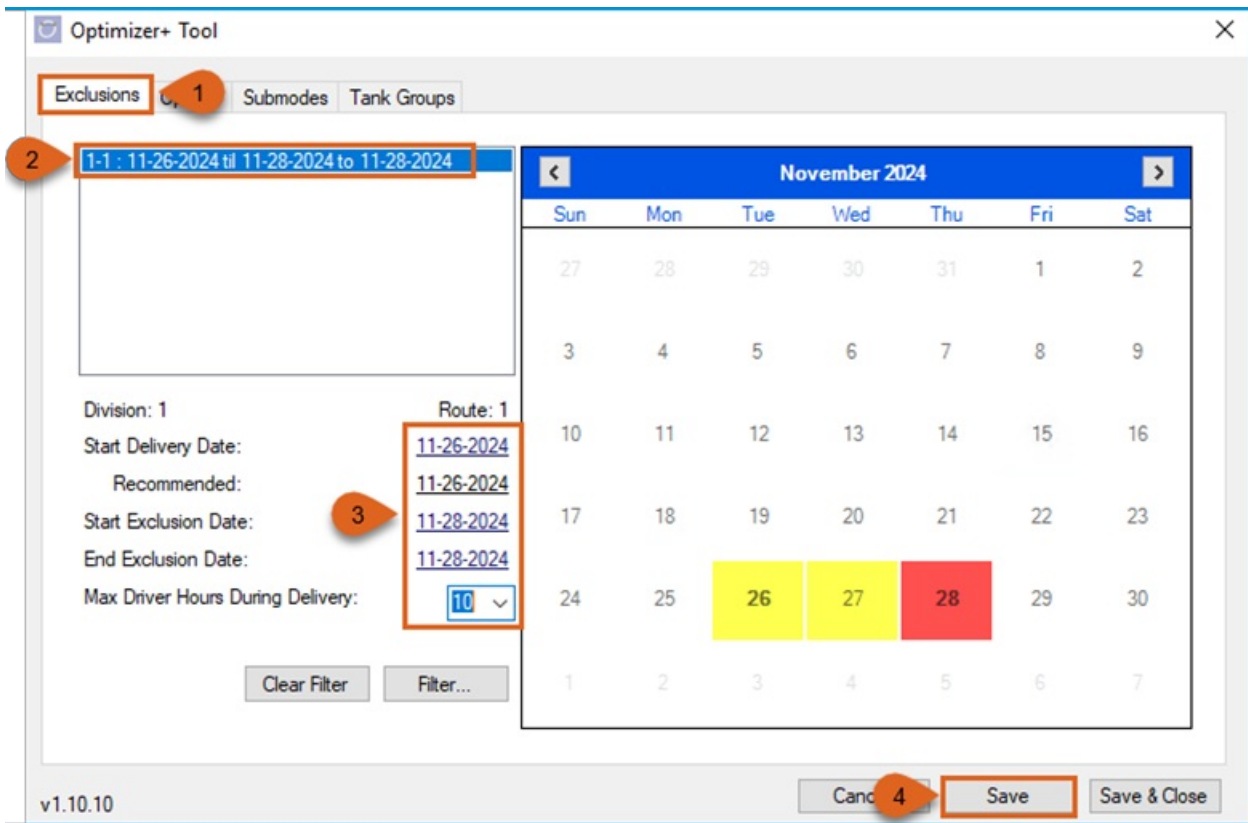
5. After viewing, click on **Cancel** to close the Optimizer+ Calendar Tool.



Editing an Exclusion Period

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool*.

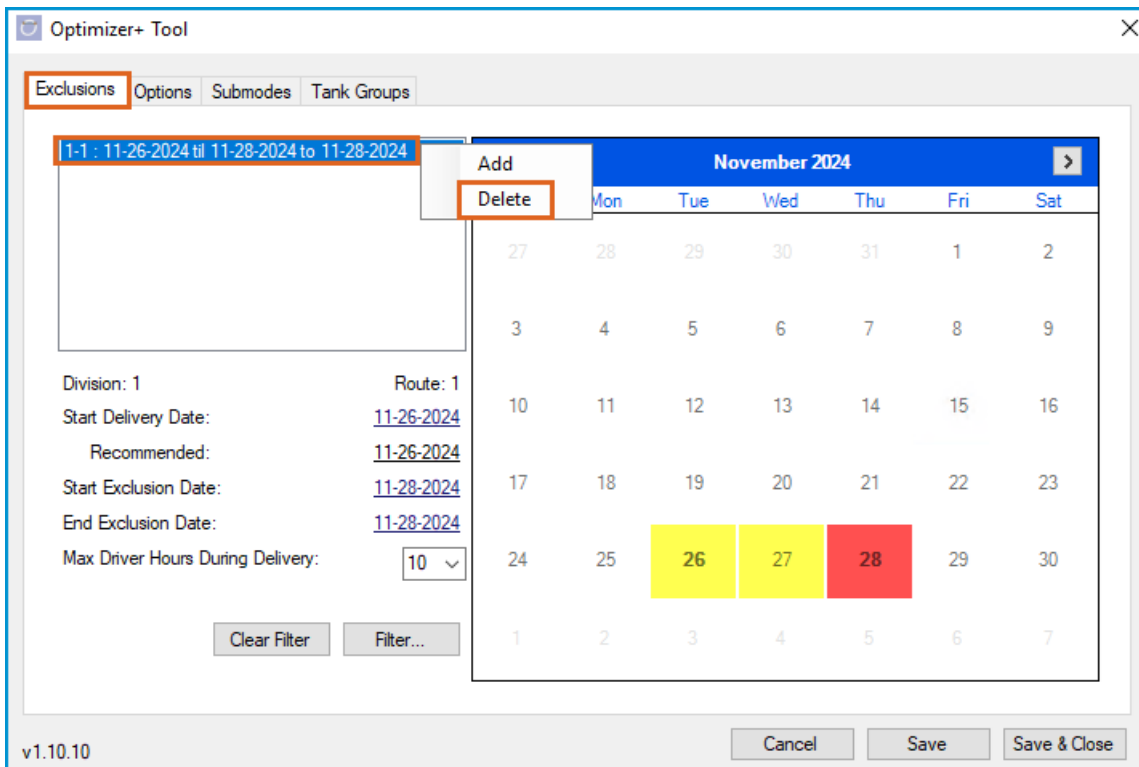
1. Select the *Exclusions* tab.
2. Select the Exclusion to be edited.
3. Any of the dates and driver Max Hours can be edited.
4. Click **Save** or **Save & Close** if no other changes need to be made in the Optimizer+ Calendar Tool.



Deleting an Exclusion Period

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool*.

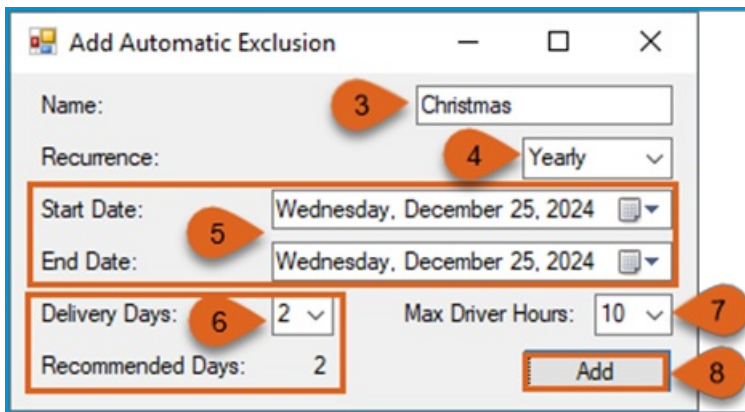
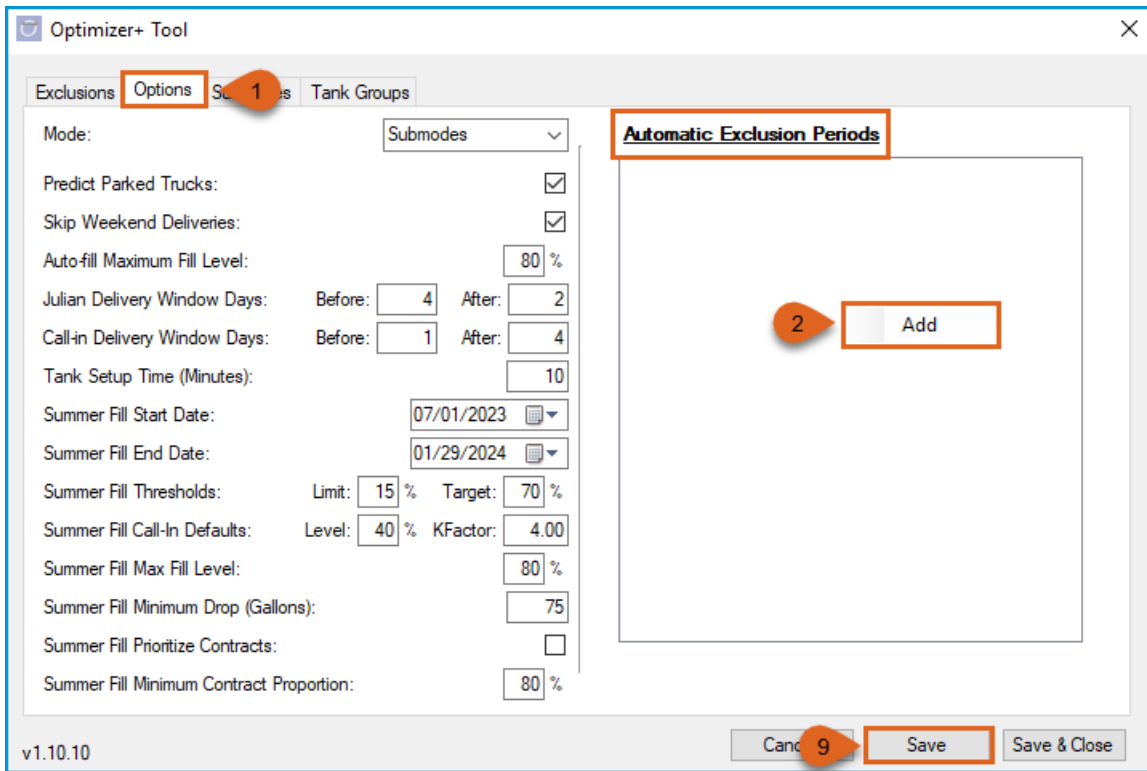
1. Select the *Exclusions* tab.
2. Select the Exclusion to be deleted.
3. Right-click and select **Delete**.
4. Click **Save** or **Save & Close** if no other changes need to be made in the Optimizer+ Calendar Tool.



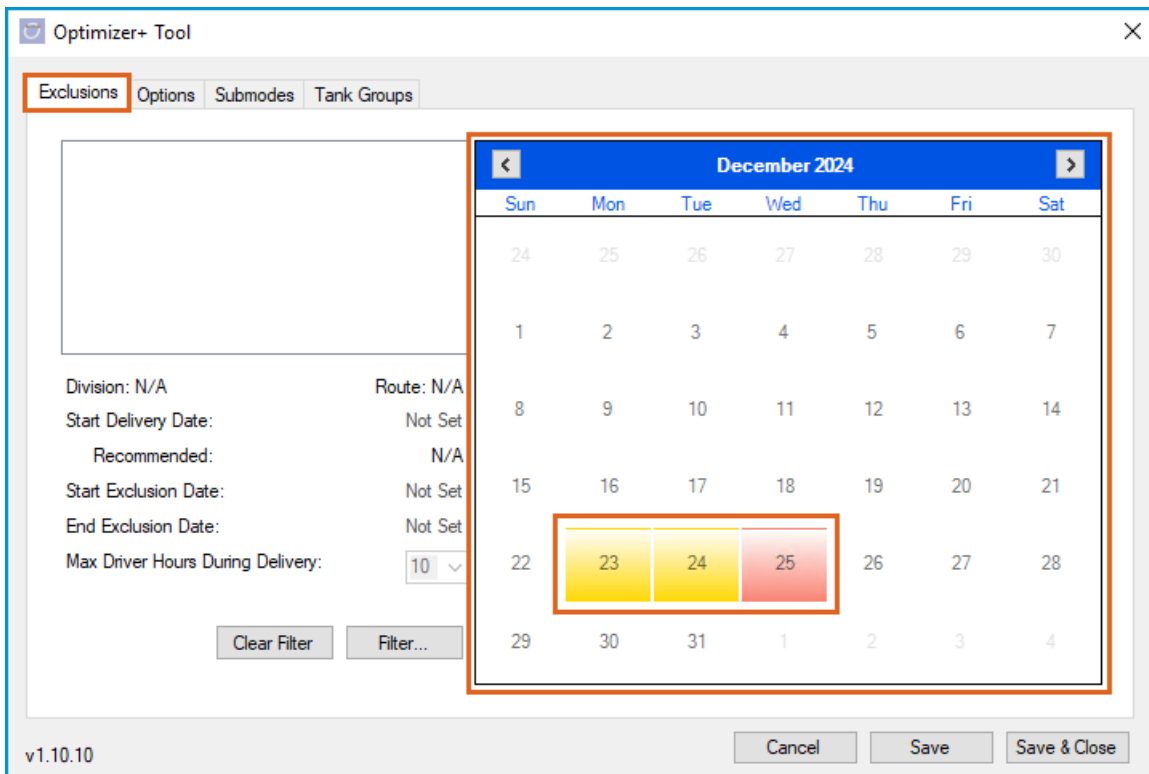
Automatic Exclusion Periods

Navigate to *Supervisor Menu / Maintenance Menu / Optimizer Maintenance / Optimizer+ Calendar Tool*.

1. Select the *Options* tab.
2. Right-click in the white box under *Automatic Exclusion Periods* and select **Add** from the pop-up menu.
3. In the *Add Automatic Exclusion* window, enter the *Name*.
4. Set the *Recurrence*: Weekly, Monthly, Yearly.
5. Enter *Calendar* icon to select the date or date range all routes will be Excluded (parked).
6. *Delivery Days* will auto populate to the *Recommended Days*, update if desired.
7. From the drop-down menu, select the *Max Driver Hours During Delivery* value to define the maximum allowed duration of the schedule.
8. Click **Add**.
9. Click **Save** or **Save & Close** if no other changes need to be made in the Optimizer+ Calendar Tool.



Note: The automatic exclusion can immediately be viewed in the calendar on the Exclusions tab. The yellow dates will indicate the Delivery Days for the Automatic Exclusion Period and the red date(s) will show the day(s) of the Route Exclusion Period effective for all routes.



WARNING: Users assume all risks associated with modifying the behavior of the Optimizer from its default or recommended settings.