Route Exclusion Periods

Last Modified on 04/15/2025 4:20 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 <u>not</u> supported during Exclusion Periods.
- Tank Groups are supported during Exclusion Periods.

Rules

- One-time Route Exclusion Period The OptimizerPlus+ 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 OptimizerPlus+, the route should successfully Park for the Exclusion Days.
 - If a Delivery Period is set up over a weekend, the OptimizerPlus+ 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 OptimizerPlus+ routes.

The OptimizerPlus+'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 OptimizerPlus+'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 OptimizerPlus+.
- 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 .

😇 Optimizer+ Tool									×
Exclusions , 1 Submodes Ta	nk Groups								
		<		J	anuary 202	24		>	
		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
2	Add		1	2	3	4	5	6	
		7	8	9	10	11	12	13	
Division: N/A Start Delivery Date:	Route: N/A	14	15	16	17	18	19	20	
Recommended:	N/A								
Start Exclusion Date:	Not Set	21	22	23	24	25	26	27	
End Exclusion Date:	Not Set								
Max Driver Hours During Delivery:	10 🗸	28	29	30	31			3	
Clear Filter	Filter	4	5	6	7	8	9	10	
v1.10.10				[Cancel		ave	Save & Clos	e

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

Add New Period			-		Х	
Division: 1	Route:	1	4	A	d	5
Specify the desired Division and R	oute or ent	ter 0 fo	r all divisions	or routes	3.	-

- 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 OptimizerPlus+ routes.

Add New	Pe	riod	00		-		×
Division:	0		Route:	0		A	dd
Specify t	the d	lesired Division and F	Route or er	nter 0 f	for all division	s or route	s.

- 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+ 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 OptimizerPlus+ will not use the period until all dates are entered.

😇 Optimizer+ Tool								×
Exclusions Options Submodes Tank Groups								
1-1 : (Not Set) til (Not Set) to (Not Set)	۲.		J	anuary 20	24		>	
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	31	1	2	3	4	5	6	
	7	8	9	10	11	12	13	
Division: 1 Route: 1 Start Delivery Date: 6 Not Set	14	15	16	17	18	19	20	
Recommended: N/A Start Exclusion Date: 7 Not Set	21	22	23	24	25	26	27	
End Exclusion Date: <u>Not Set</u> Max Driver Hours During Delivery: 9 10 ~	8 28	29	30	31				
Clear Filter Filter	4	5	6	7	8	9	10	
v1.10.10			[Cane 1	0 5	àve	Save & Clos	se

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 OptimizerPlus+ 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+ Tool.

1-1 : 11-26-2024 til 11-28-2024 to	11-28-2024	6		Ne	wember 2	124		
		Sun	Mon	Tue	Wed	Thu	Fri	Sat
		27					1	2
		3	4	5	6	7	8	9
Division: 1 Start Delivery Date:	Route: 1	10	11	12	13	14	15	16
Recommended:	11-26-2024	17	10	10		01	22	22
Start Exclusion Date: End Exclusion Date:	<u>11-28-2024</u> <u>11-28-2024</u>	17	3	19	20	21	22	23
Max Driver Hours During Delivery:	10 ~	24	25	26	27	28	29	30
4 Clear Filter	Filter	1	2	3	4	5	6	7

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+ Tool*.

1-1 : 11-26-2024 til 11-28-2024 to 11-28-20	24		No	ovember 2	024		
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	27					1	2
	3	4	5	6	7	8	9
Division: 1 Start Delivery Date: <u>11</u>	Route: 1 1-26-2024	11	12	13	14	15	16
Recommended: 11 Start Exclusion Date: 3	1-26-2024 1-28-2024 17	18	19	20	21	22	23
and Exclusion Date: 11 Max Driver Hours During Delivery:	1- <u>28-2024</u> 24	25	26	27	28	29	30

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+ Tool.

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Exclusions Options Submodes Tank Groups								
1-1 : 11-26-2024 til 11-28-2024 to 11-28-2024					224			
	Add		No	ovember 20	124		>	
	Delete	Mon	Tue	Wed	Thu	Fri	Sat	-
	27					1	2	
	3	4	5	6	7	8	9	
Division: 1 Ro	ute: 1	11	12	13	14	15	16	
Start Delivery Date: 11-26	-2024							
Start Exclusion Date: 11-26	- <u>2024</u> -2024 17	18	19	20	21	22	23	
End Exclusion Date: <u>11-28</u>	-2024							
Max Driver Hours During Delivery:	0 🗸 24	25	26	27	28	29	30	
Clear Filter Filter.		2	3	4	5	6	7	
v1.10.10				Cancel	S	ave	Save & Clos	se

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+ Tool.

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Exclusions Options Sc. 1 s Tank Groups	
Mode: Submodes ~	Automatic Exclusion Periods
Predict Parked Trucks:	
Skip Weekend Deliveries:	
Auto-fill Maximum Fill Level: 80 %	
Julian Delivery Window Days: Before: 4 After: 2	
Call-in Delivery Window Days: Before: 1 After: 4	2 Add
Tank Setup Time (Minutes): 10	
Summer Fill Start Date: 07/01/2023	
Summer Fill End Date: 01/29/2024	
Summer Fill Thresholds: Limit: 15 % Target: 70 %	
Summer Fill Call-In Defaults: Level: 40 % KFactor: 4.00	
Summer Fill Max Fill Level: 80 %	
Summer Fill Minimum Drop (Gallons): 75	
Summer Fill Prioritize Contracts:	
Summer Fill Minimum Contract Proportion: 80 %	
v1.10.10	Cance 9 Save Save & Close

🖳 Add Automatic Exe	lusion	-		×	
Name:	3	Christmas			
Recurrence:	-	4	Yearly	~	
Start Date:	Wednesday, D	ecember 2	25, 2024		
End Date:	Wednesday, D	ecember 2	25, 2024		
Delivery Days: 6	2 ~ M	ax Driver H	Hours:	10 ~	7
Recommended Days:	2		Ado	з 🚺	8

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.

Exclusions Options Submodes Tank	Groups							
		۲.		De	ecember 20)24		>
		Sun	Mon	Tue	Wed	Thu	Fri	Sat
								30
		1	2	3	4	5	6	7
Division: N/A	Route: N/A	8	9	10	11	12	13	14
Start Delivery Date: Recommended:	NOT SET							
Start Exclusion Date:	Not Set	15	16	17	18	19	20	21
End Exclusion Date:	Not Set					1		
Max Driver Hours During Delivery:	10 ~	22	23	24	25	26	27	28
Clear Filter	Filter	29	30	31	1	2		4
	L]

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