# WellRyde Dispatch Portal
# Route Configuration – Creating a New Template

## Introduction

Templates are the rules and guidelines that guide the Route Optimization engine for the automatic creation of routes. Templates are a collection of parameters that the route optimization engine follows to create the most efficient routes.

On a daily basis, the dispatcher will choose from a selection of pre-configured templates, which includes previously stored drivers and vehicle information.

Click on any of the links below to go directly to that section of the job aid to learn more about how to create templates:

1. [Template Details](#)
2. [Route Constraints](#)
3. [Service Time & Arrival Threshold](#)
4. [Capacity Constraints](#)
5. [Route Start Location](#)
6. [Filter & Sorting Sequence](#)
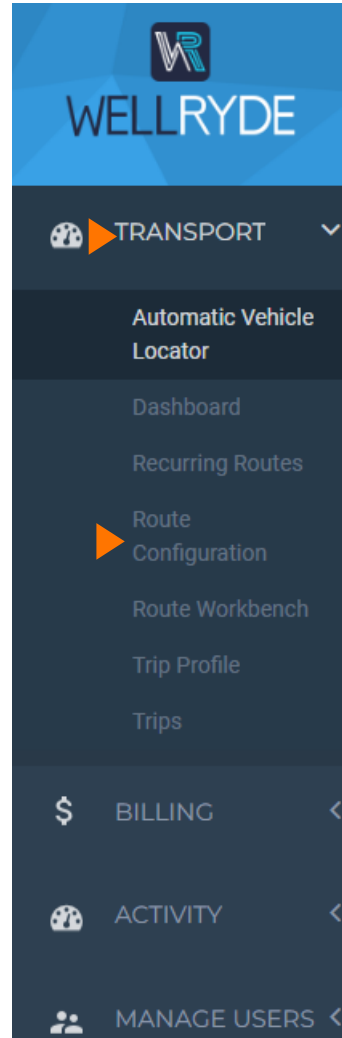7. [Saving & Viewing Created Templates](#)

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## Section 1: Template Details

Existing templates may be edited as needed by changing the parameters of the template. Additional templates may also be created as needed.
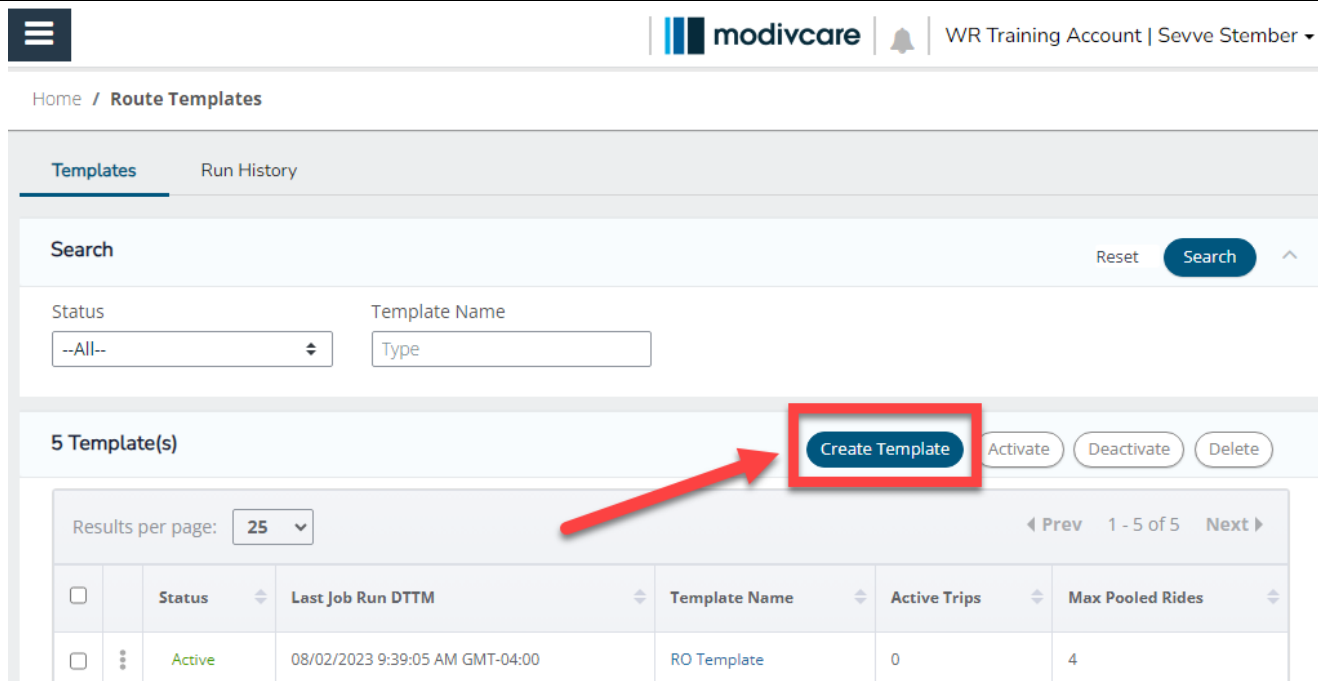
To create a template:

- Click **Transport,** then
- Click **Route Configuration.**
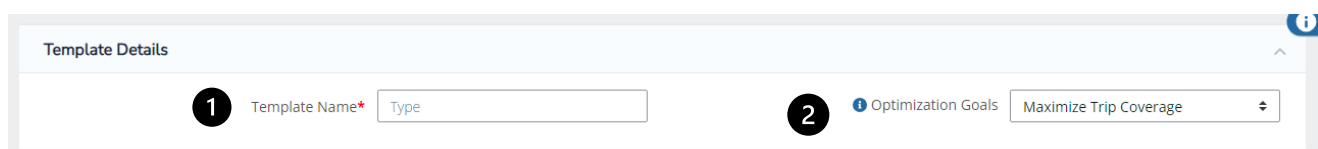
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When the Route Templates screen displays. Click **Create a Template**.



Next, the Create New Route Template screen displays. Complete the fields in the **Template Details** section:

❶ **Template Name:** Enter the a name for the template.

❷ **Optimization Goals:** Select you desired optimization goal.



**Important Note:** Notice **Coverage Constraint** is added to the Template Details section when the **Maximize Profit within Trip Coverage** was chosen. Fill in this field before moving on.

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## Section 2: Route Settings

Next, complete the six items within the **Route Settings** section:

**Geo Cluster Radius in miles-** When considering from where the driver is starting, how far out do you want the system to look to group trips nearest to that driver?

- Sometimes the use of multiple templates can prove useful because of this particular parameter.
- For example, one template could be named "In-town", while another template could be named "Out of town".

**Max Pooled Riders-** When multi loading, what is the maximum number of people you can put into a vehicle? (Although the vehicle can safely seat a certain number of passengers, consideration of Covid-19 protocol restrictions may reduce the number of passengers to allow more space between each member)
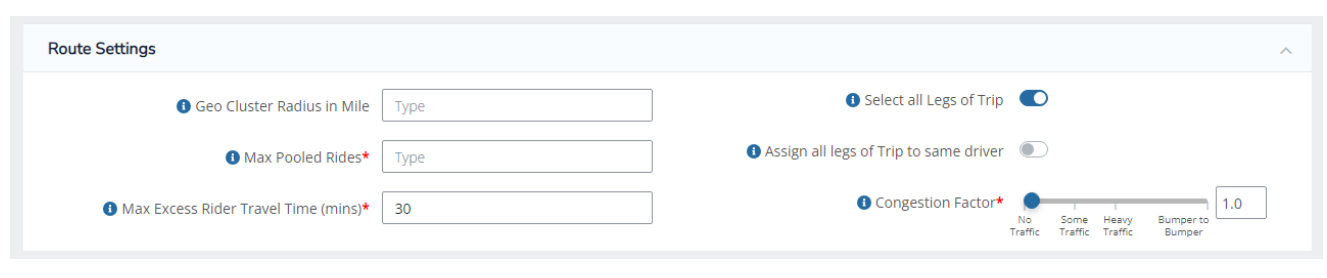
**Max Excess Rider Travel Time-** When multiloading, what is the longest period of time any one member can be in your vehicle from the time you pick them up, to the time you drop them off ?

**Congestion Factor**- Considers how much trafic you may have in a given area. You may enter whole numbers or decimals to force the system to factor more or less time for traffic when it optimizes suggestions.

**Select all Leg of Trip**- This button selects all legs (leg a, leg b, etc.) of the trips within the route configuration template

**Assign All Legs to Driver-** Toggle this button "ON" to assign both the A and B legs of a trip to the same driver. Often times, the dispatcher will assign the A leg to a driver, and wait to assign the B leg later in the day, as it may become more time or cost efficient to allow a different driver to perform the B leg of the trip.

**Important Note: Click the little blue info "i"** next to the parameter title anytime you'd like to get more information about this parameter.

### Route Settings

| | |
|---|---|
| ⓘ Geo Cluster Radius in Mile | *Type* |
| ⓘ Max Pooled Rides★ | *Type* |
| ⓘ Max Excess Rider Travel Time (mins)★ | 30 |
| ⓘ Select all Legs of Trip | ⬤ |
| ⓘ Assign all legs of Trip to same driver | ◯ |
| ⓘ Congestion Factor★ | No Traffic — Some Traffic — Heavy Traffic — Bumper to Bumper  1.0 |

## Section 3: Service Time & Arrival Threshold

Next, complete the six items within the **Service Time & Arrival Threshold** section:

**Average Pick Up (PU) Service Time (in minutes) -** Time it takes to load/pick up a member and secure them into the vehicle

**PU Early Arrival Threshold (in minutes) -** Acceptable time for which the driver can arrive early to the PU

**Drop Off (DO) Early Arrival Threshold (in minutes) -** Acceptable time for which the driver can arrive early to the PU

**Average DO Service Time (in minutes) -** Time it takes to drop off a member at the destination

**PU Late Arrival Threshold (in minutes) -** Acceptable time for which the driver can arrive late at the PU

**DO Late Arrival Threshold (in minutes) -** Acceptable time for which the driver can arrive late at the DO

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**Service Time & Arrival Threshold**

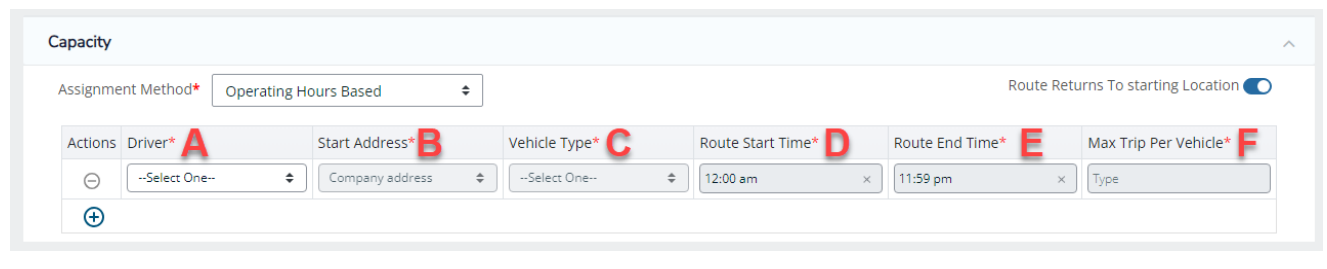| ⓘ Average PU Service Time (mins)* | Type | ⓘ Average DO Service Time (mins)* | Type |
| --- | --- | --- | --- |
| ⓘ PU Early Arrival Threshold (mins)* | Type | ⓘ PU Late Arrival Threshold (mins)* | Type |
| ⓘ DO Early Arrival Threshold (mins)* | Type | ⓘ DO Late Arrival Threshold (mins)* | Type |

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## Section 4: Capacity

Next, complete the seven items within the **Capacity** section:

a. **Driver**- Select the driver from the drop down menu.

b. **Street Address**- Select the place from where the trip will start using the drop down menu.

- Selection of the word "**Origin**" means the trip will start from a central location.

- Remember, if you choose "**Driver home**", the driver's home address must be previously stored in their user record located in the "Manage Users" section of the WellRyde portal.

c. **Vehicle Type**- Select the type of vehicle the driver will use from the drop down menu.

d. **Route Start**- Choose a time for the driver to start the route. Click **Done** to save the route start time, or click **Clear** to re-enter a different route start time.

e. **Route End**- Choose a time for the driver to end the route. Click **Done** to save the route end time, or click **Clear** to re-enter a different route end time. Split shifts can be managed from this section.

f. **Max Trips Per Vehicle**- The maximum number of trips per vehicle per route, within that routes start and route end period of time. Consider how many trips you want to assign to a particular vehicle.

- Manipulation of this feature can assist the dispatcher in determining how many drivers are actually needed for the total number of routes for a particular time.

- Consider how many drivers are availble, and the total number of trips there are for that route, for that particular period of time.

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## Section 5: Route Start Location

Now, complete the required fields within the **Custom Address** section:
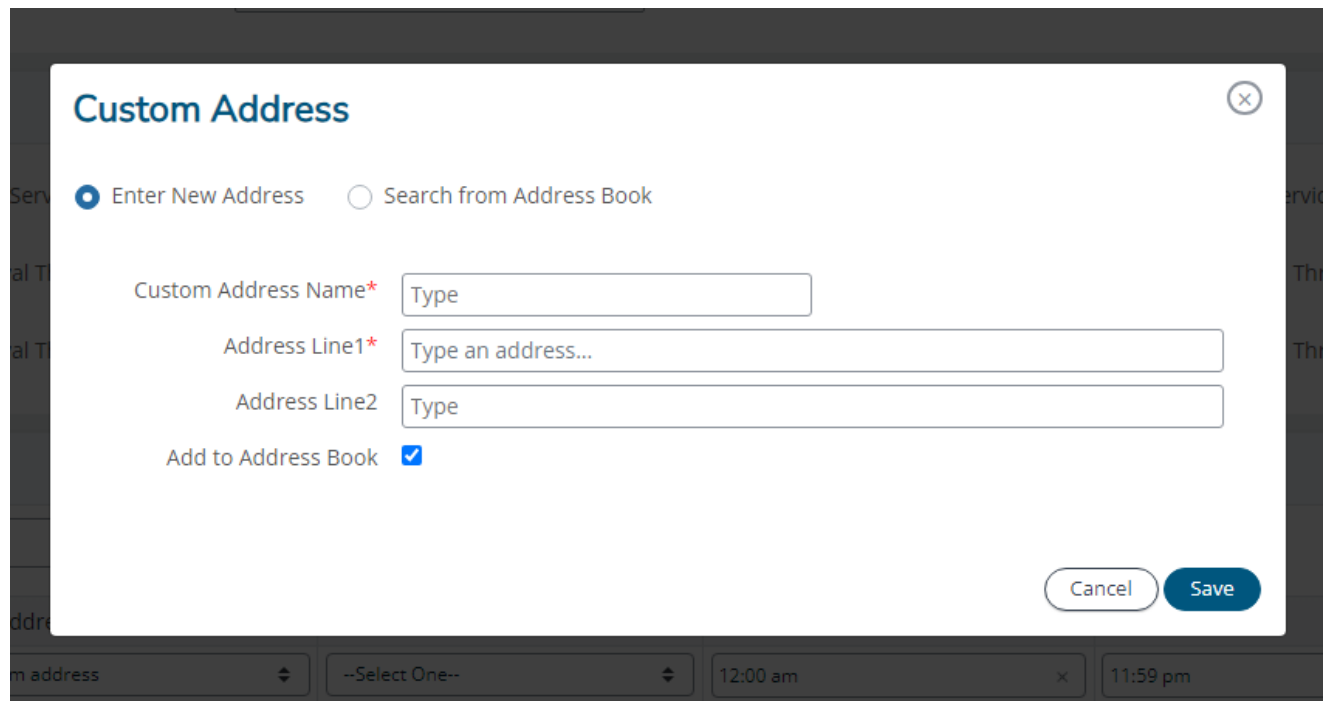
**Important Note:** You will only complete this section if you've selected **Custom address** from the **"Start Address"** dropdown menu in the **"Capacity"** section above. Additionally, you can enter a new address or search from Address Book if you think the address may have already been entered.

> **Custom Address Name-** Choose a name for the origin such as "Office", "Home", etc.
>
> **Address Line 1-** Enter the street address, city, state, and zip code of the origin.
>
> **Address Line 2-** Enter additional details, as needed, such as appartment number, etc.
>
> Click the **"Add to Address Book"** button now, or you may do this later.

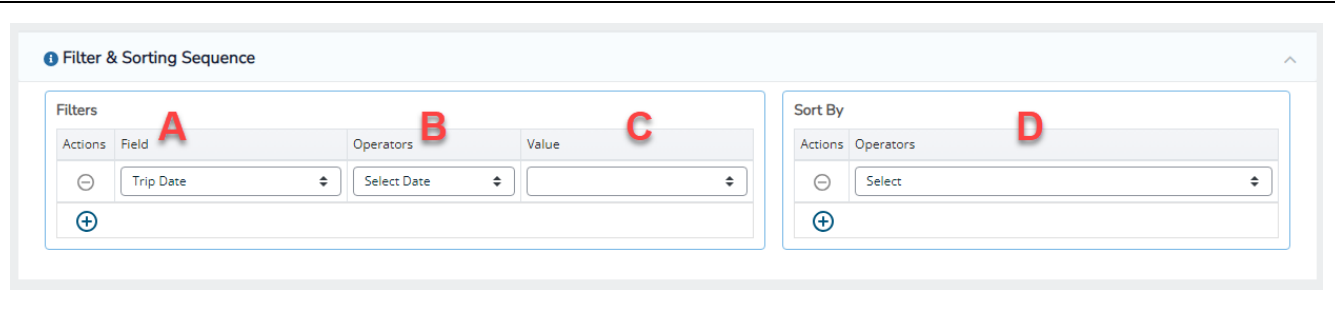## Section 6: Filter & Sorting Sequence

Complete the fields in the **Filter & Sorting Sequence** section.

The filter feature allows the dispatcher to view all the trips based on a specific criteria. For example, to set the filter criteria by Trip Date for tomorrow:

a. Select "**Trip Date**" from the Field drop-down menu.

b. Select "**Select Date**" from the Operators drop-drown menu.

c. Select **Tomorrow** from the Value drop-down menu.

d. The Sort By section is currently not being used at this time.

## Section 7: Saving & Viewing Created Templates

Once all the required fields are filled in, click the **Create Template** button in the upper right hand corner of the screen to create the template.



Home / Route Templates / Create New Route Template — [Create Template] [Cancel]

To view the the template just created:

a. Click **Transport**, and then
b. Click **Route Configuration.**
c. The Route Templates screen displays. There are two tabs at the top of the screen:
   - **Templates-** shows you all the templates created. You can also view the status of created routes from this window.
   - **Run History-** allows you to view errors, which may be causing a route not to run, such as Python Code errors or other technical issues.

   To view the newly created template, click **Templates**.