Delivery Operations Information System (DOIS)

Minor Route Adjustments - Job Aid

November 25, 2008

Revision History

Date	Author	Description
5/25/2005	Jack Sheridan/Naomi Rook	Initial creation
8/9/2005	Rick Helser	Minor changes to text
10/24/2005	Charlie Fisher	Minor changes to text
8/24/2006	Naomi Rook	Addition of MSP instructions
09/08/2006	Naomi Rook/David Fontanez	Minor changes to text/Post Adj. Checklist
09/20/2006	Naomi Rook	Additions to Initial Prep and Common Issues
10/12/2007	Carole Kohr	Addition of M-39 reference
10/28/2008	Naomi Rook	Addition of scenario warning message
11/25/2008	Naomi Rook	Addition of Rejected scenario warning

1.0 Overview

This document describes the steps to perform a minor adjustment in DOIS.

1.1 Definition

There are two types of minor adjustments in DOIS:

1.1.1 Normal minor adjustment – Routes are adjusted by transferring territory between routes, using current route data in DOIS.

1.1.2 Restricted minor adjustment – Restricted adjustments are solely for the purpose of adjusting route base information such as base office and street time. No territory can be transferred between any routes. Router time can not be edited in a Restricted Minor. If Router time will be involved in the adjustment, leave the Restricted Minor Adjustment box un-checked.

1.2 Initial Preparation

1.2.1 Ensure that Address Management Systems (AMS) has been notified and there are no Electronic Edit Sheet (EES/WinSSI) transactions pending AMS approval. Pending EES transactions will prevent a successful database lock.

1.2.2 Ensure that there is not an existing effective date in AMS for any ZIP Codes involved in the adjustment. If an effective date already exists in AMS, it will need to be removed using the “Activate Current” function within AMS. Once the effective date is removed from AMS, DOIS will then lock overnight. However, the Select Method for Transfer button will not be available until the Monday following the lock date.

1.2.3 Ensure that each route that will be involved in the adjustment has a Full PS Form 3999 on the Mainframe, and that each 3999 has been properly edited. You can not adjust any route that does not have a 3999. Nor can you add a 3999 once the adjustment has been defined.

1.2.4 Plan to define the Minor Route Adjustment in DOIS on a Friday. The default lock date for a Minor will be the Friday of the following week. However, you may re-set the lock date for the current Friday. This will allow you to begin the adjustment the following Monday. DOIS assumes that you have conducted carrier consultations before defining the adjustment.

1.2.5 Identify office/street times and manual office factors for each route.

1.3 Common Issues

Current 3999s for routes to be adjusted must be on the Mainframe in DOIS before the minor adjustment is defined. Adding one after an adjustment is defined will not be possible in DOIS. You must first cancel the adjustment, then add the 3999 (on the office side) and save to the mainframe, then define a new adjustment.

Warning: If an adjustment scenario is placed into a 'Rejected' status at any point during the process, you must perform a 'Clear All', first in the Scenario window and then again in the Select Method for transfer window. Next, you will need to start the scenario over again, beginning with the Select Method for Transfer step. If you fail to 'Clear All' and go on to edit and re-sequence a rejected scenario, the route adjustment file will become corrupted. Although it may appear normal as you are editing and re-sequencing, when AMS receives it, the scenario will contain many errors with the territory as well as the re-sequencing. To avoid rejecting a scenario, ensure that all the territory is moved to the correct routes. It is recommended that you check your work using AMS edit sheets to make certain that you have accounted for every sector segment. However, if it becomes necessary to have a scenario rejected, you must perform a 'Clear All'.

Route IDs in DOIS must match those in AMS before route adjustments can be implemented successfully. Contact AMS prior to implementation to ensure that they have not changed any route numbers, or that no extra route numbers exist in AMS that do not exist in DOIS. Even "empty" AMS route IDs involving no sector segment or delivery point information will create a problem for the DOIS implementation process. Route numbers may only be changed in AMS after the status of the route adjustment is changed in DOIS from "In Progress" to "Implemented".

Constant communication with AMS is necessary for a smooth route adjustment process.

To determine street time, the M-39, section 141.19 provides:

Using the most recent Form 3999, deduct the vehicle loading time, travel time to and from route, time spent collecting from collection boxes, time spent for relays, gassing vehicle, vehicle moves, replenishing mail after loop, breaks, and comfort stop time. Divide the remainder by the number of possible deliveries to determine the street time used per delivery.

Please note: For minor adjustments only, since the allied time described above is already removed in determining street time for territorial adjustments, no allied time will be displayed in the scenario transfer tool window and will not be included in the transfers between routes.

2.0 Procedures

2.1 Define New Adjustment

Go to the application tab on the DOIS Menu bar and select the Route option. (NOTE: If your DOIS profile is Route Inspector, you will automatically come to this screen when you log in to DOIS). This will take you to the Route Inspections and Adjustments window. Click on the Define New Adjustment button.

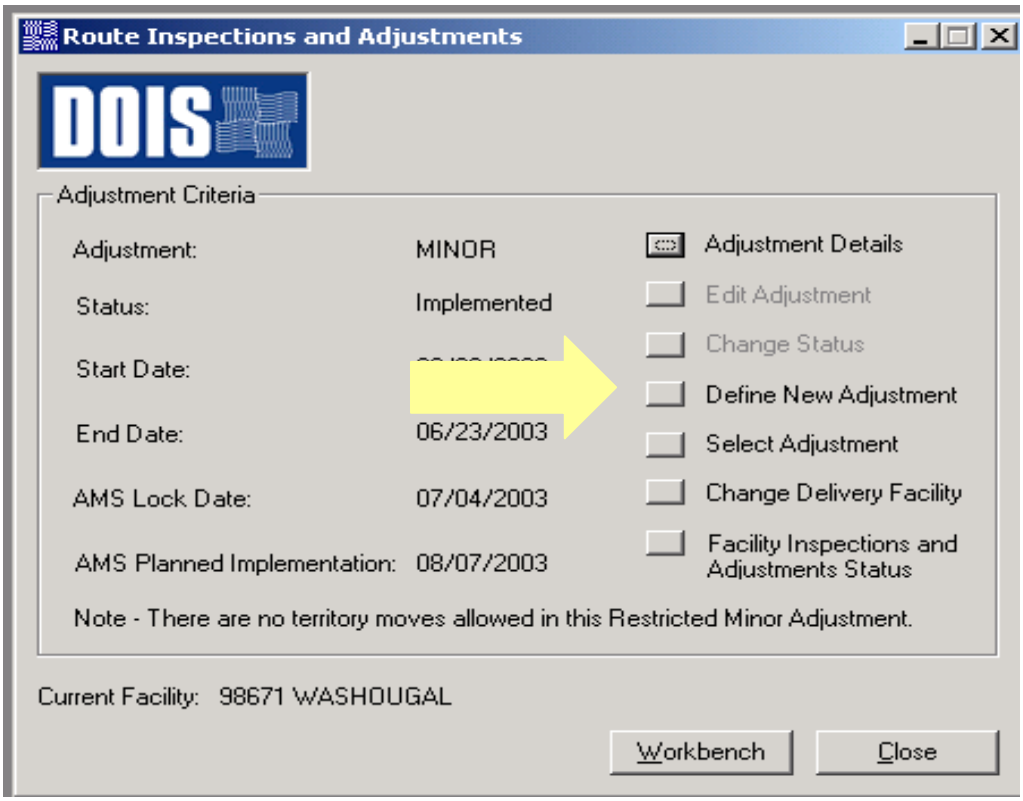


Figure 1

2.2 Adjustment Type

See figure 2. Select the type of adjustment by toggling to Minor Adjustment. Select your Start Date by toggling up or down on the boxes next to the date. The Lock date will automatically default to the following Friday. The Planned Implemetation date will automatically default to 45 days for Minor Route Adjustments, however AMS will select an effective date. If your Minor Adjustment is for the purpose of editing office and street times only, and will not require territory moves or router time, check the Restricted Minor Adjustment box.

Note: Once the Lock Date is reached, Edit book changes or EES/WINSSI transactions can be submitted to AMS for processing, however, these transactions will not process until the adjustment is implemented.

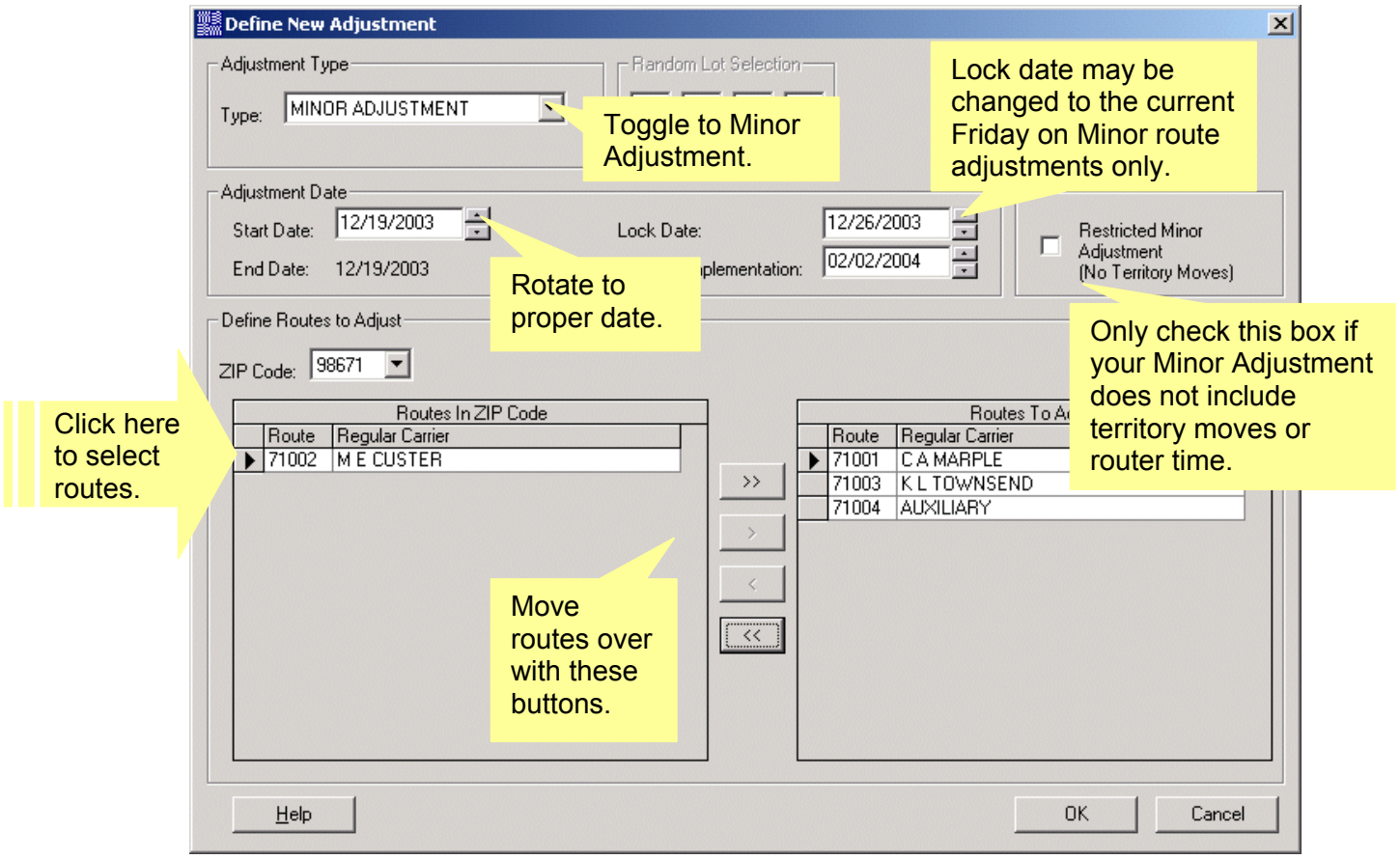


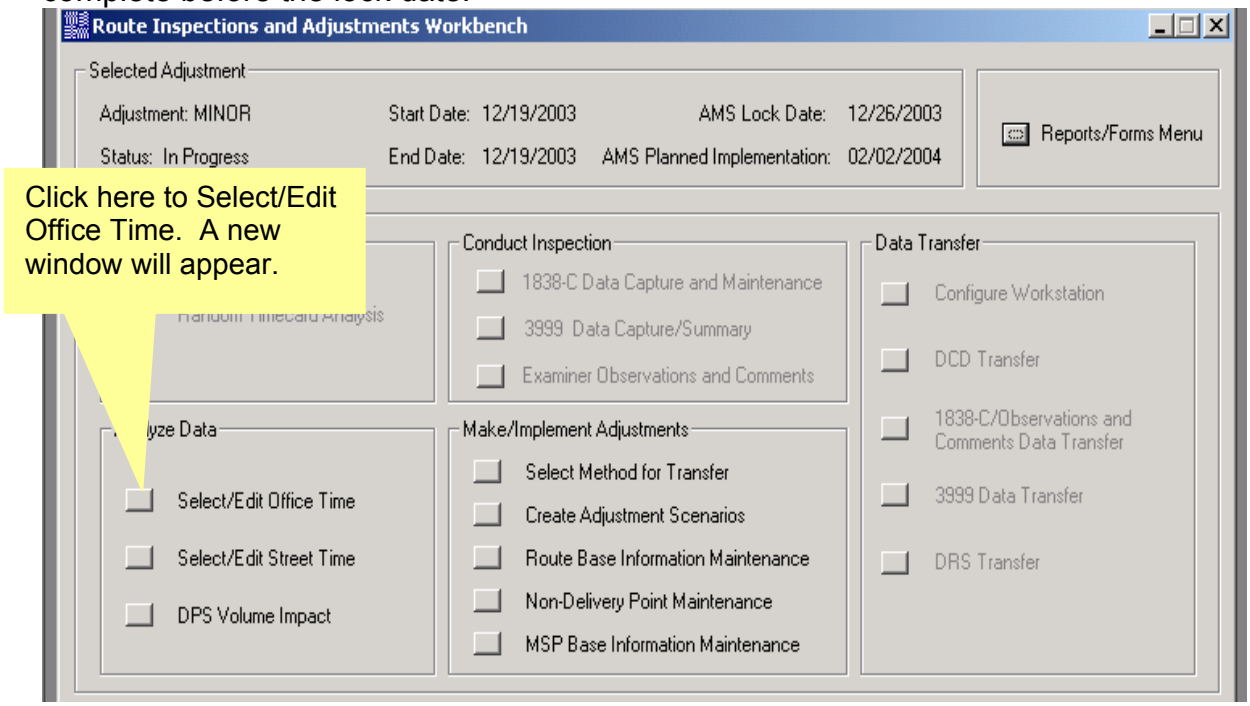
Figure 2

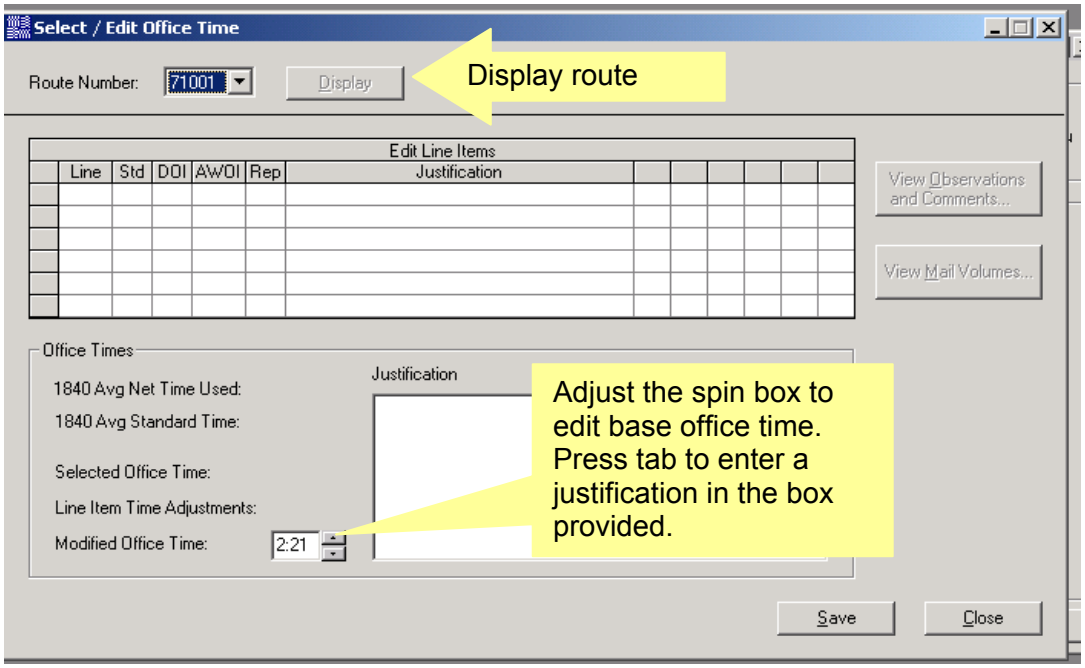
2.3 Define Routes to Adjust

The next step is to select the routes that will be involved in the adjustment. The top double arrow will automatically move over all routes. The single arrow will move over routes one at a time. To move routes individually, click in the gray area to the left of each route desired and then use the single arrow to move each route to the Routes to Adjust screen. Click OK, and you will be automatically returned to the Route Inspections and Adjustments window as shown in Figure 1. Click on the Workbench button to open the Inspections and Adjustments Workbench window. Since all Routes Lock in AMS, all routes should be selected for part of the adjustment. You cannot add routes once you start.

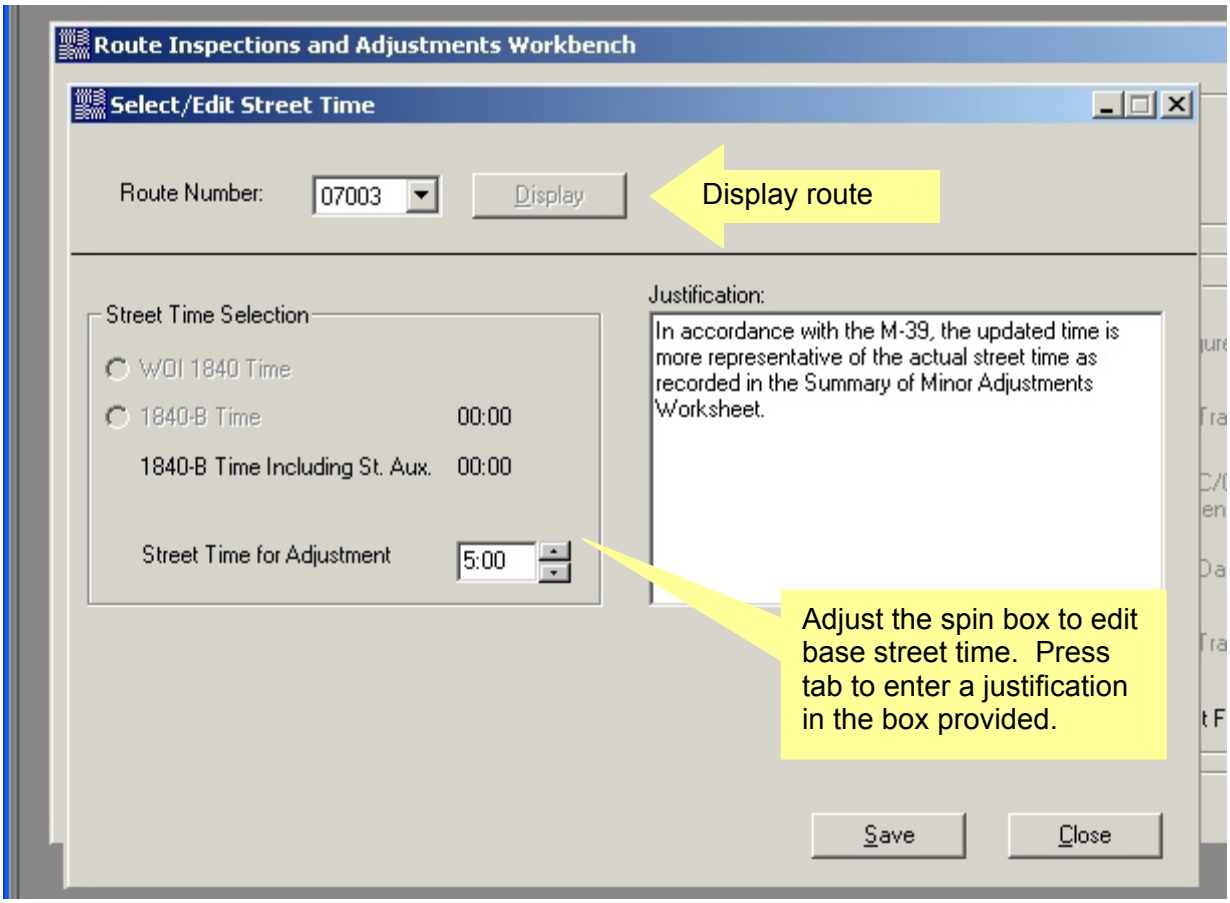
2.4 Select/Edit Office and Street Times

Selecting/editing office and street times are the last steps DOIS will allow you to complete before the lock date.





Once you have the desired Office Time, click on the Save button and then click on the Close button. Follow these steps for each of the routes in the adjustment.

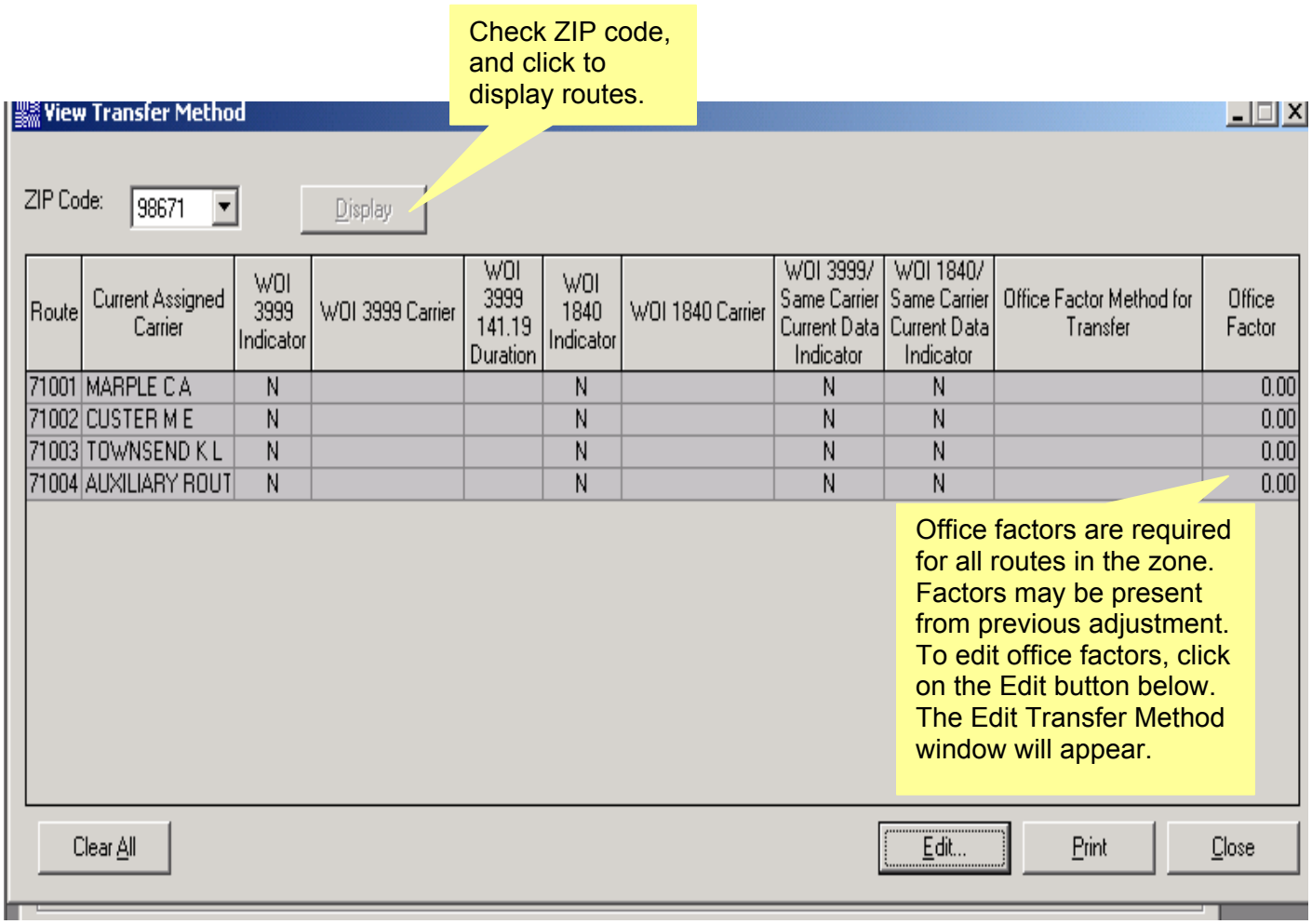


Once you have the desired street time, click on the Save button and then click on the Close button. Follow these steps for each of the routes in the adjustment. (Justification comments are required before you can save)

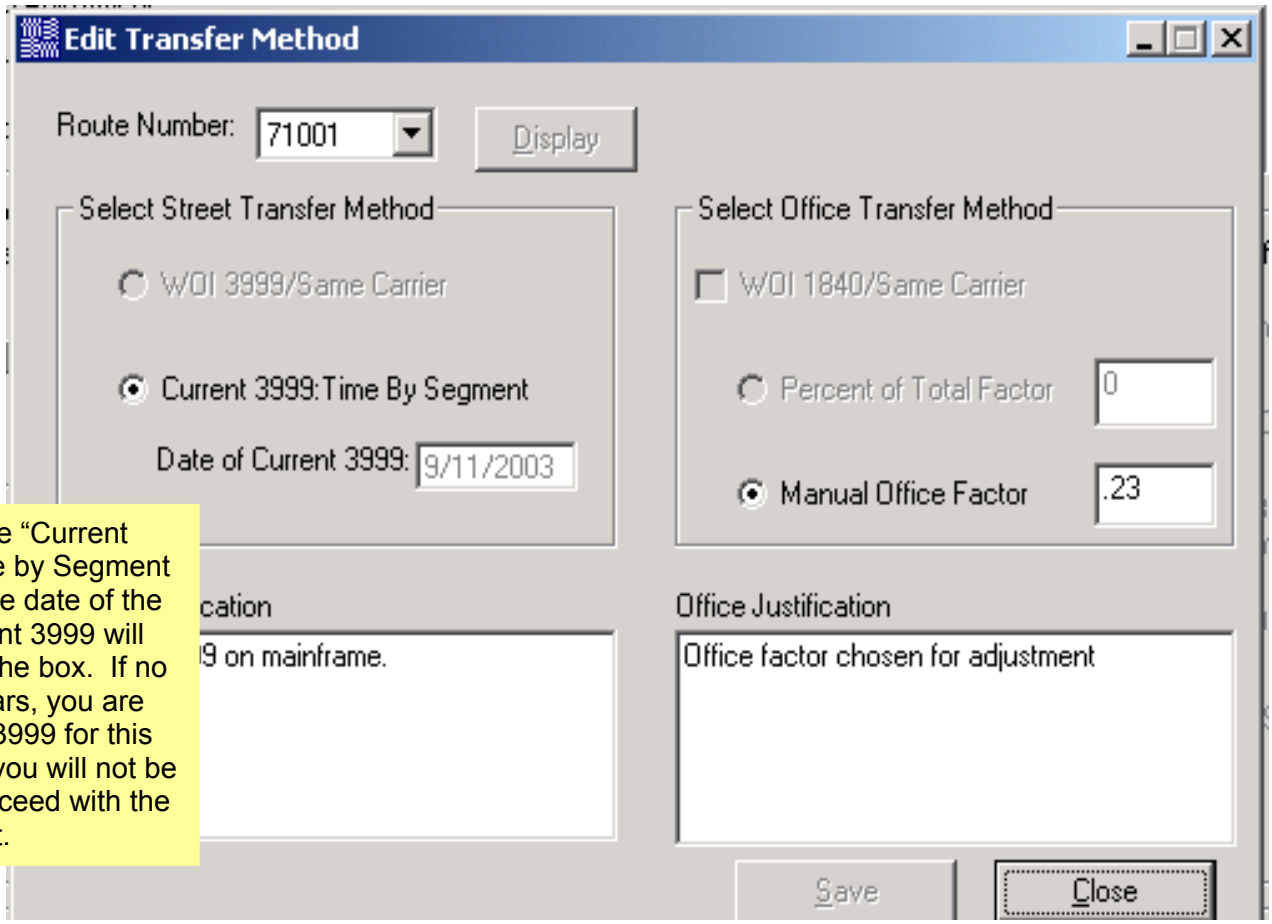
Note: The remaining route adjustment steps may not be completed until the Monday following the lock date.

2.5 Select Method for Transfer

On Monday following the lock date open the View Transfer Method window by clicking on Select Method for Transfer from the Workbench window. This enables you to determine the method of transferring office time. Clicking on the Edit button, will enable you to put in office factors for the movement of office time. There must be a current PS Form 3999 on record which will be used to calculate and move street time.



2.6 Edit Transfer Method



Click on the "Current 3999: Time by Segment button. The date of the most current 3999 will appear in the box. If no date appears, you are missing a 3999 for this route and you will not be able to proceed with the adjustment.

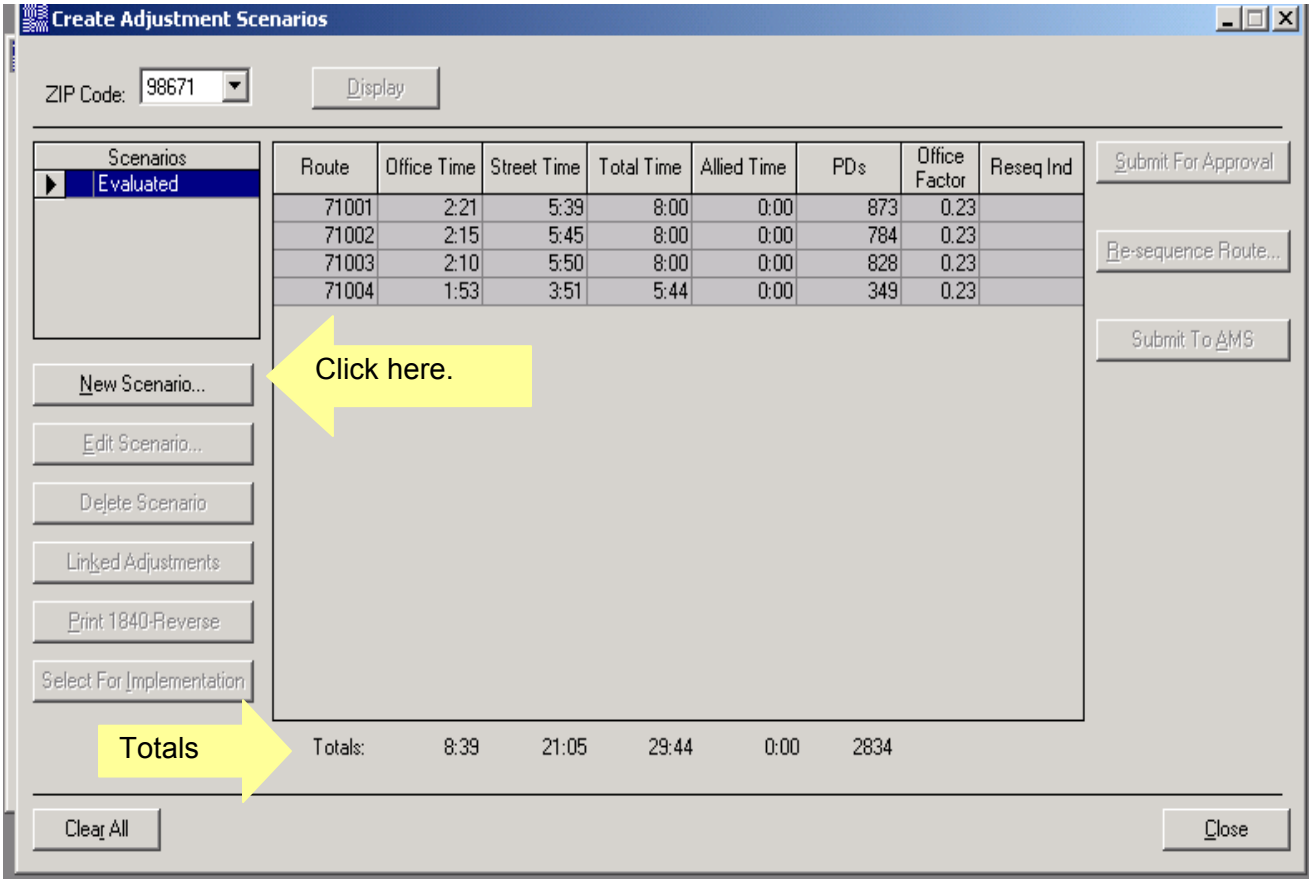
Display the route number, and click on Current 3999. The 3999 will be used to calculate your street time. The office factor is calculated by taking the number of office minutes minus the fixed office minutes, divided by the number of deliveries. Input the office factor and save for each route. When finished, close this window and print the entire zone for future reference in the adjustment by clicking on the Print button from the View Transfer Method window.

Note: You must enter the manual office factor for each route in the Zone, even if all of the routes are not included in the adjustment.

Comments are required to be able to save.

2.7 Create Adjustment Scenarios

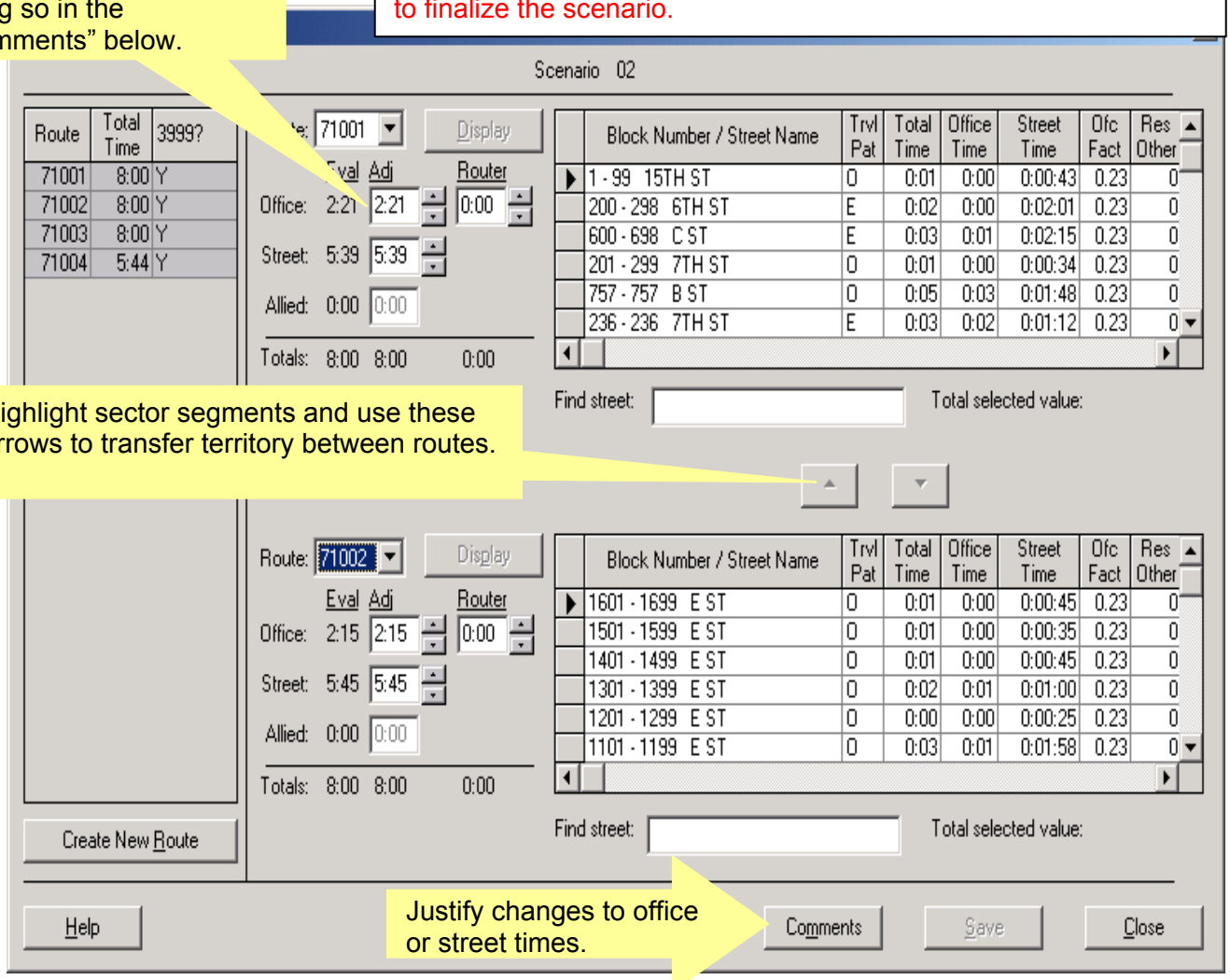
The next step is to Create New Scenario. By clicking on this, the following window will appear. This window displays the office and street times chosen by Management to be used in making the territorial changes. Make sure the Zip Code field is displayed and then click on the Display button.



By clicking on the New Scenario button, the following window will appear.

If it is necessary to edit times after you have moved territory, you must provide a justification for doing so in the "Comments" below.

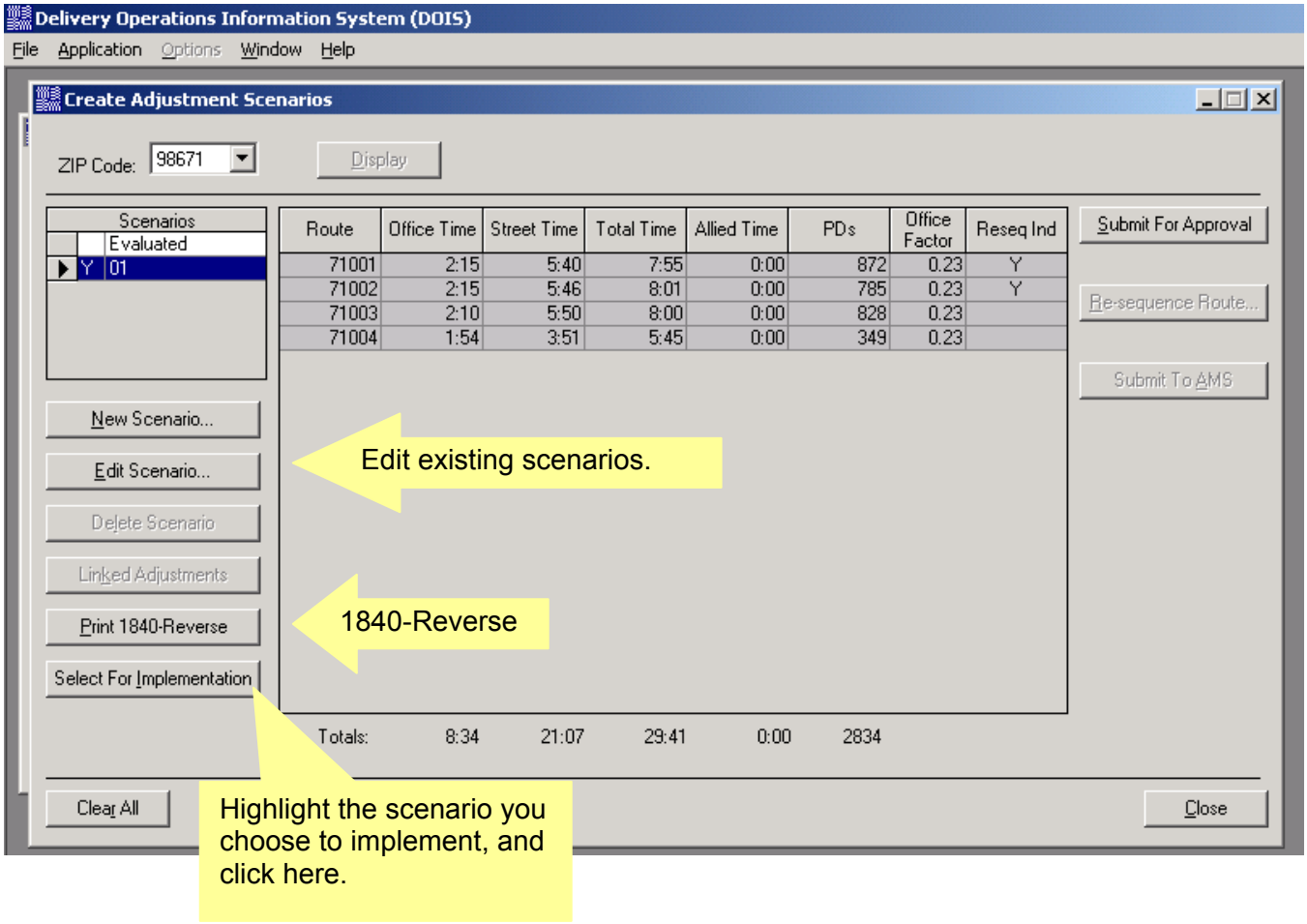
Warning! If you remove all the sector segments from a route, you may not be able to access the route again. Until you are certain about abolishing a specific route in a scenario, you may want to leave at least one sector segment on the route until you are ready to finalize the scenario.



This window is where the adjustments to the routes will be completed. The current 3999 is displayed on the right side of the screen with times that will be used for the adjustment. As you move sector segments from one route to another, the office and street times automatically increase and decrease reflecting the changes. When you have completed the transfer of territory, you will have an opportunity to make a final modification to office or street times. However, it is preferrable to set these during the Select/Edit office and street phase of the adjustment. You must justifiy any changes to the DOIS computed times by clicking on the Comments button and typing in your justification. When you have finalized the territory movement and are satisfied with the office and street times, click Save. Click the Close button to return to the Create Adjustment Scenarios window. You may create up to five adjustment scenarios.

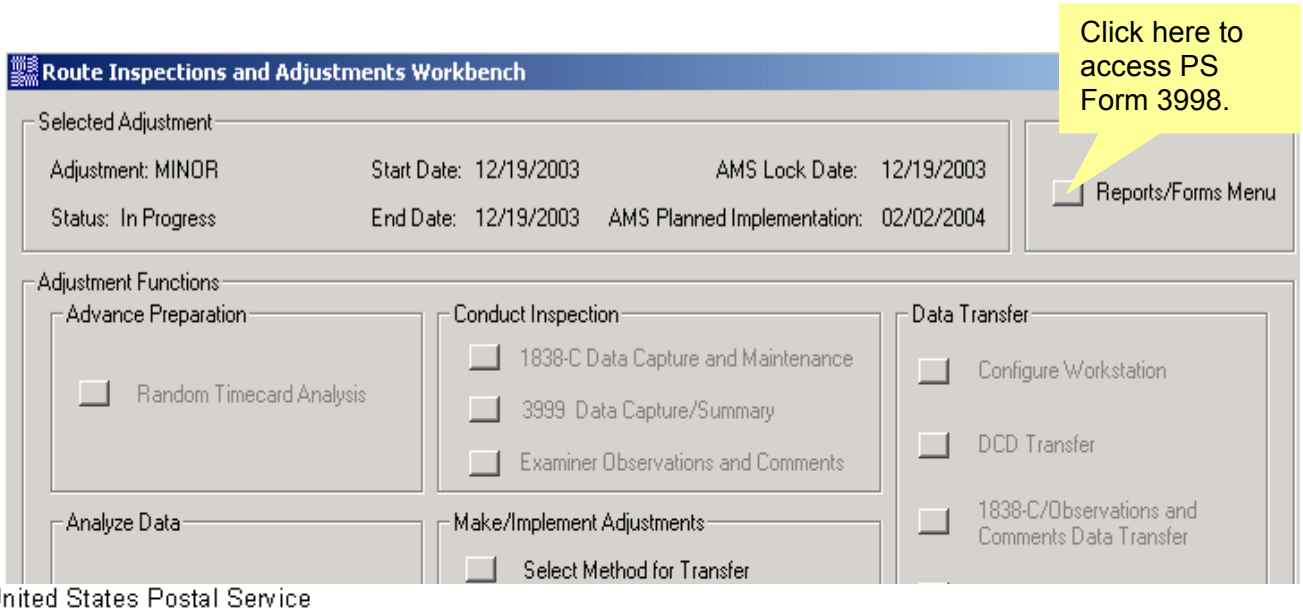
2.8 Select for Implementation

The next step is to review each scenario and determine which scenario to implement. To select a scenario for implementation, highlight the scenario and click Select for Implementation. When the DOIS message box appears, click YES. Notice that a Y appears next to the scenario selected for implementation. After you have selected a scenario for implementation, the next step is to create the appropriate summary and adjustment reports, such as PS Form 1840-Reverse and PS Form 3998-Unit Summary. Click the Print 1840-Reverse button. After printing out your 1840-Reverse forms, click the Close button to return to the Route Inspections and Adjustments Workbench.



2.9 Reports and Forms

Print an updated PS Form 3998 by accessing the Reports/Forms Menu.



United States Postal Service

Unit Summary of City Delivery Assignments

City and State: WASHOUGAL, WA	ZIP + 4 Code 98671-9998		Date 01/02/2004
Delivery Unit 98671	Counts and Inspections Made	From 12/19/2003	To 12/19/2003

Section 1 - Letter Carriers	Before Adjustments: Number of Assignments DAILY (a)	Before Adjustments: Net Total Time Used WEEKLY (b)	Proposed Changes: Number of Assignments DAILY (c)	Proposed Changes: Number of Hours DAILY (d)	After Adjustments: Number of Assignments DAILY (e)	After Adjustments: Total Hours WEEKLY (f)	Total Number of Routes Exceeding the Maximum Office Time Allowed (g)	Weekly Total Hours (f) Divided by	Percent of Avg. Daily Hours
1. Full-Time Regular Routes	3	144.00	0	0.00	3	144.00	0		
2. Auxiliary Routes	1	34.40	0	0.02	1	34.50			
3. Routers Assignments	0	0.00	0	0.00		0.00		Daily Avg. (h)	(i)
4. **Totals**	4	178.40	0	0.02	4	178.50		29.8	100%

5. Describe action taken to eliminate excess office time.

	(a) Before Adjustments		(b) After Adjustments		(c) Anticipated Due to New Construction		
	Business	Residential	Business	Residential	Business	Residential	
6. Total Possible Deliveries	Other 95	77	Other 95	77	Other 0	0	
	Curb 96	1796	Curb 96	1796	Curb 0	0	
	NDCBU 15	646	NDCBU 15	646	NDCBU 0	0	
	Other Cent 0	109	Other Cent 0	109	Other Cent 0	0	
7. **Totals**	Before 2834		After 2834		Anticipated 0		

8. Delivery Volumes	Letters (a)	DPS (b)	Flats (c)	Seq. (d)	Total Volume (e)	Parcel Post (f)

Section 2 - Parcel Post and Combination Routes	Before Adjustments: Total Routes (a)	Before Adjustments: Total Hours Weekly Weekdays (b)	Before Adjustments: Total Hours Weekly Sat (c)	Proposed Inc/Dec in Routes (d)	After Adjustments: Total Routes (e)	After Adjustments: Total Hours Weekly Weekdays (f)	After Adjustments: Total Hours Weekly Sat (g)		
1. Full-Time Regular Routes									
2. Auxiliary Routes									0.0%

PS Form 3998

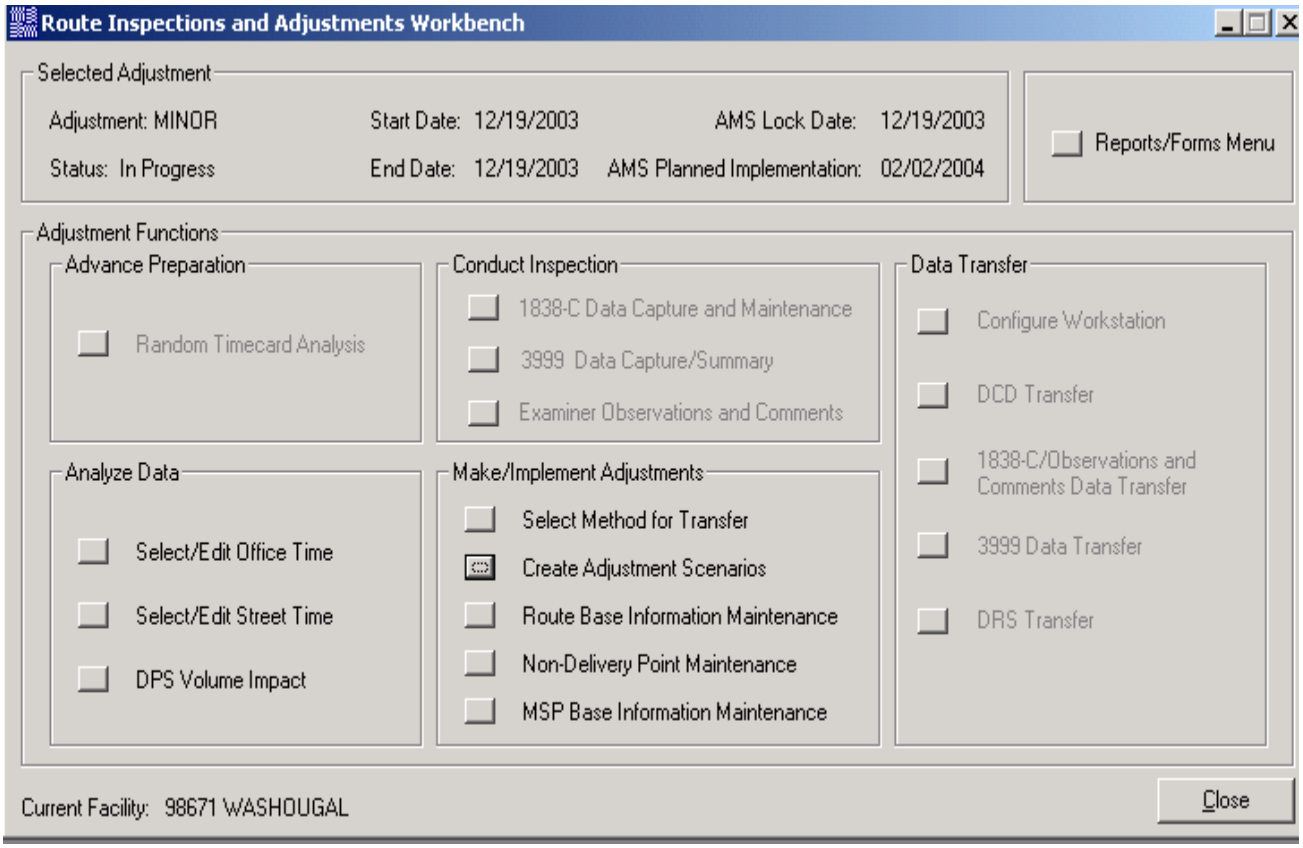
3. Auxiliary Assistance to Complete ... veries

Mon	Tue	Wed	Thur	Fri	Sat	Mon	Tue	Wed	Thur	Fri	Sat

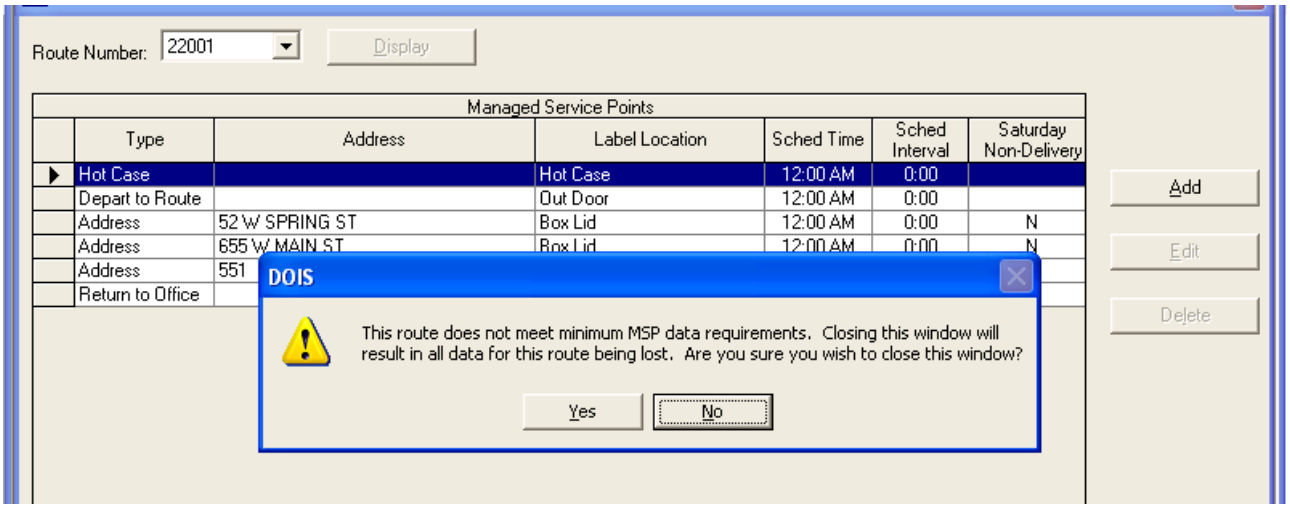
After printing the 3998, select Next to close this form and return to the Route Inspections and Adjustments Workbench. You can add or edit data by clicking in one of the boxes

2.10 Maintain MSP Information

MSP Scan points associated with territory that was moved in the Create Adjustment Scenarios are automatically deleted. In some cases, this will cause the number of scan points to fall below the minimum required 4 street scans. (This is only possible during the adjustment process.) Click on MSP Base Information Maintenance from the Route Inspections and Adjustments Workbench, or MSP Maintenance from the Route Re-sequencing window to review the status of remaining scan points and add new points as necessary. The scheduled scan time will remain 12:00 AM until a new pivot plan is created after the adjustment has been implemented.

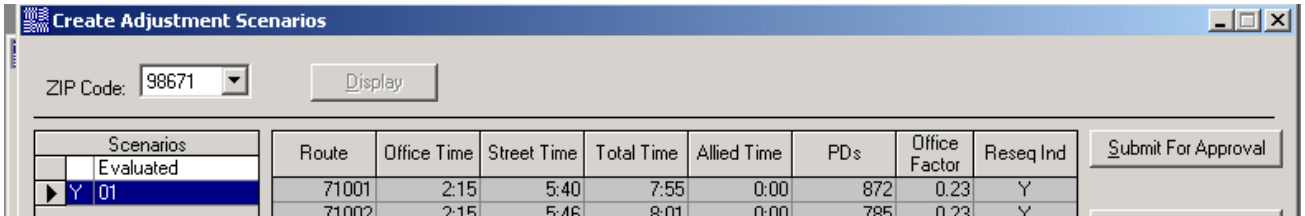


Note: If MSP scan points are not maintained during Click here to maintain MSP points. MSP can also be maintained in the Route Re-sequencing window.
process, the route's containing fewer than 4 street ***to do so after implementation. Consequently, the next ti*** ***Maintenance is accessed, users will be required to*** ***ssary to bring the routes back up to a minimum of 4 street sc*** ***<u>If the user exits out of the window without doing so, ALL of that route's scan points (office and street) will be deleted.</u> Until the scan points are added back in the route will be considered "Undeployed" to MSP in WebEIS.***



2.11 Submit for Approval

After you have maintained MSP scan points, submit the selected scenario for the area/district approval. (Remember, you will have an additional opportunity to Maintain MSP at the route re-sequencing stage.) Then, return to the <u>Create Adjustment Scenarios</u> window to <u>Submit for Approval.</u>

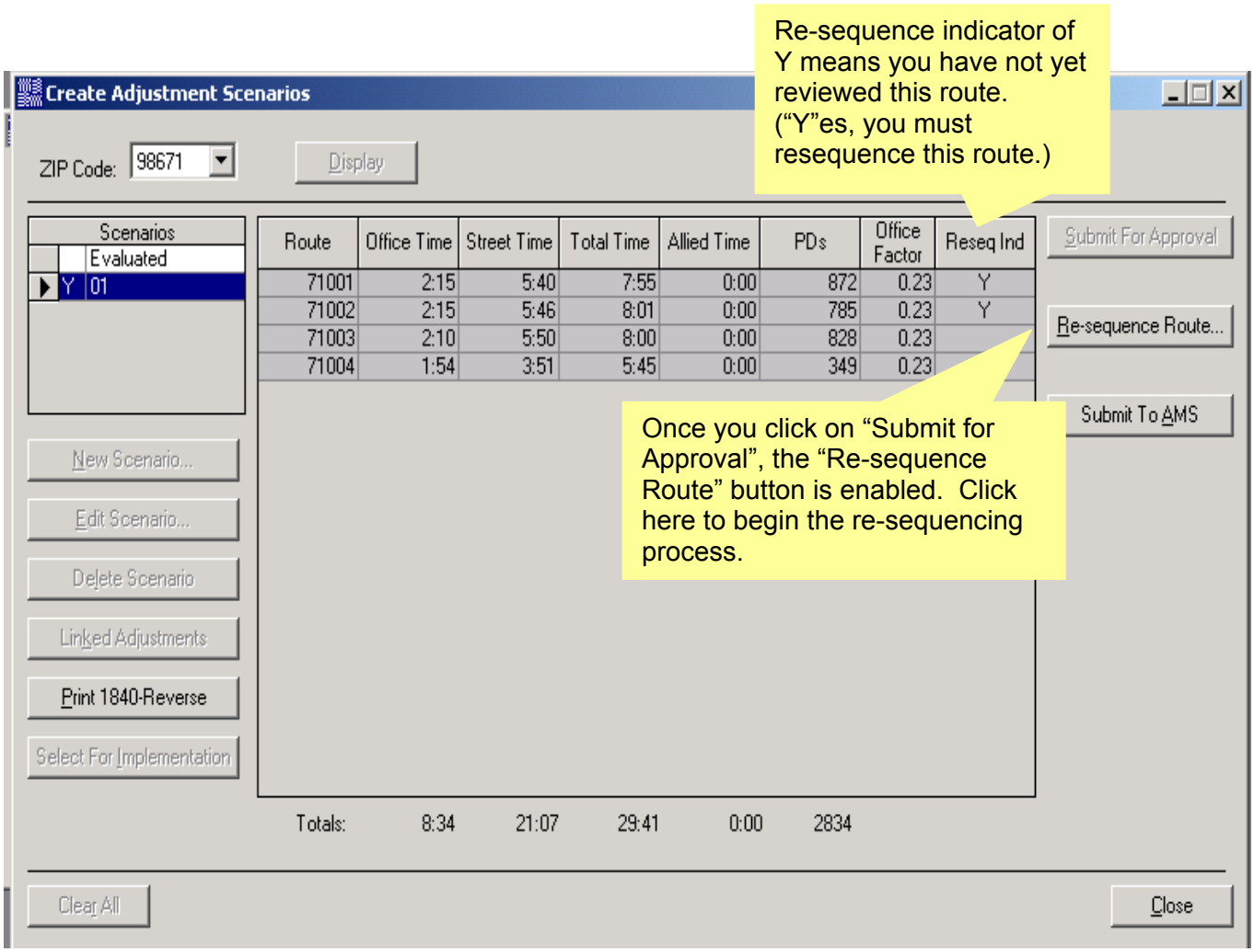


Click here when you are ready to submit for approval. ***Note: Once the adjustment is approved, you will no longer be able to edit the scenario nor resequence the route(s).***

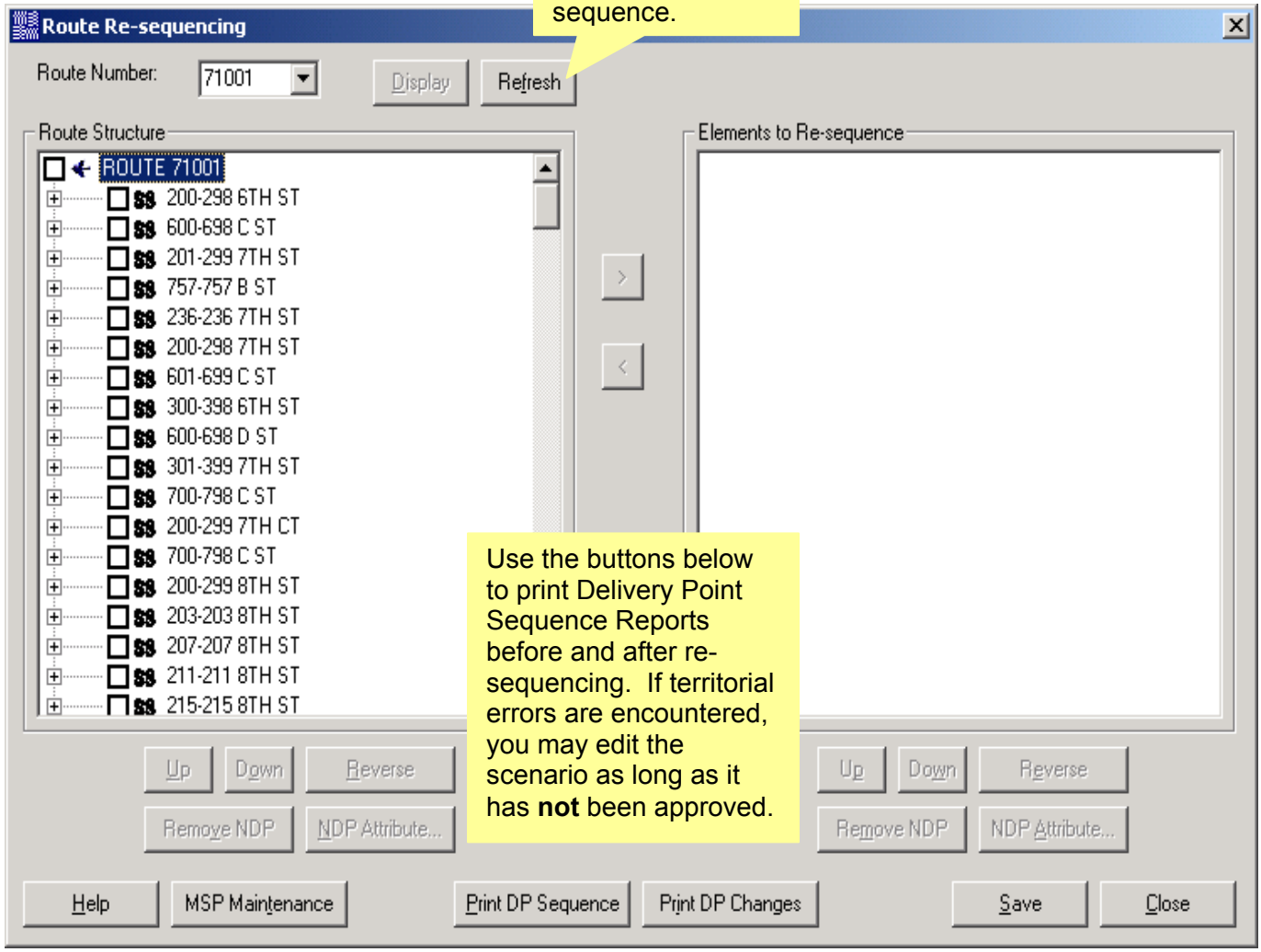
Warning: If an adjustment scenario is placed into a 'Rejected' status at any point during the process, you must perform a 'Clear All', first in the Scenario window and then again in the Select Method for transfer window. Next, you will need to start the scenario over again, beginning with the Select Method for Transfer step. If you fail to 'Clear All' and go on to edit and re-sequence a rejected scenario, the route adjustment file will become corrupted. Although it may appear normal as you are editing and re-sequencing, when AMS receives it, the scenario will contain many errors with the territory as well as the re-sequencing. To avoid rejecting a scenario, ensure that all the territory is moved to the correct routes. It is recommended that you check your work using AMS edit sheets to make certain that you have accounted for every sector segment. However, if it becomes necessary to have a scenario rejected, you must perform a 'Clear All'.

2.12 Re-sequence Routes

The Re-sequence Route button is now enabled. Any routes included in the territorial adjustment will be marked with a Y in the re-sequence indicator column to indicate that their route structure has not yet been reviewed. Click the Re-sequence Route button and the following screen will appear.



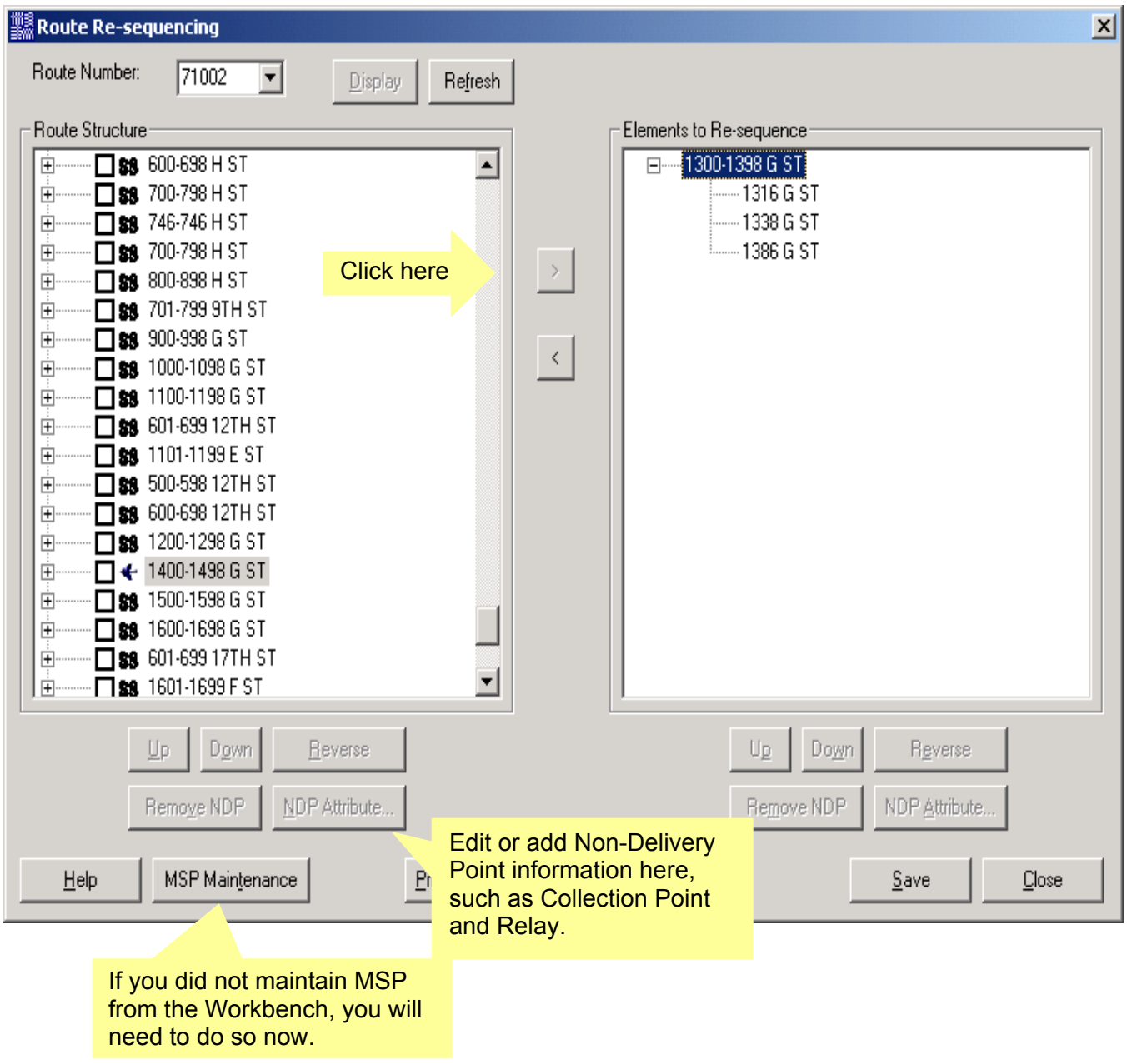
Note: If you choose not to use the re-sequencing function in DOIS, you will still need to display and save each route in the re-sequencing window below and submit to AMS. Re-sequencing can then be done by AMS



Select the route number from the drop down list box. Next, click the Display button to display the most recent route structure. You will now be able to expand and contract sector segments in order to view the delivery points. Users may reverse the order of all delivery points within a sector segment by clicking the Reverse button in either the Route Structure or Elements to Re-sequence grid. Use the Up and Down buttons to change sector segment and delivery point order.

Note: Users must display the current route structure in the Route Re-sequencing window and click Save for every route even if no changes are made to the delivery pattern. This will ensure a complete data transfer to AMS.

Expand the sector segment by checking the check box to the left of that sector segment. Notice that the sector segment has now expanded to show its exact components. In order to focus on the elements within this sector segment, click the **>** button.

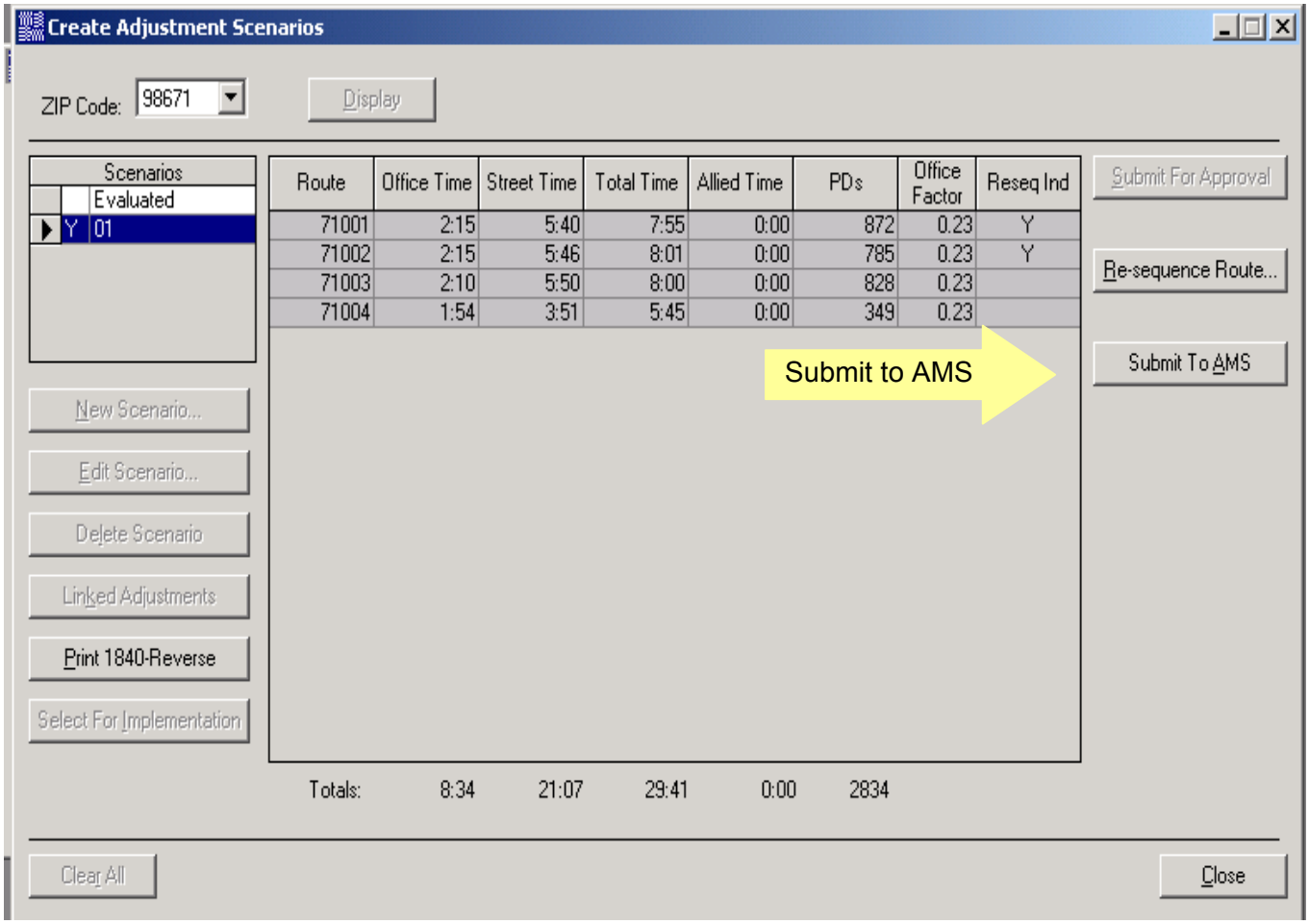


Upon completion of re-sequencing, **ensure that all MSP maintenance is completed**. **Please refer to section 2.10 Maintain MSP Information found on page 15 of this document.** Save the new route structures and then Close.

2.13 Submit to AMS

Once the route adjustment process is completed and all re-sequencing is completed, notify the District Area Approver that the adjustment is ready for approval.
Remember: Once your route adjustment is approved, you will no longer be able to edit the scenario.

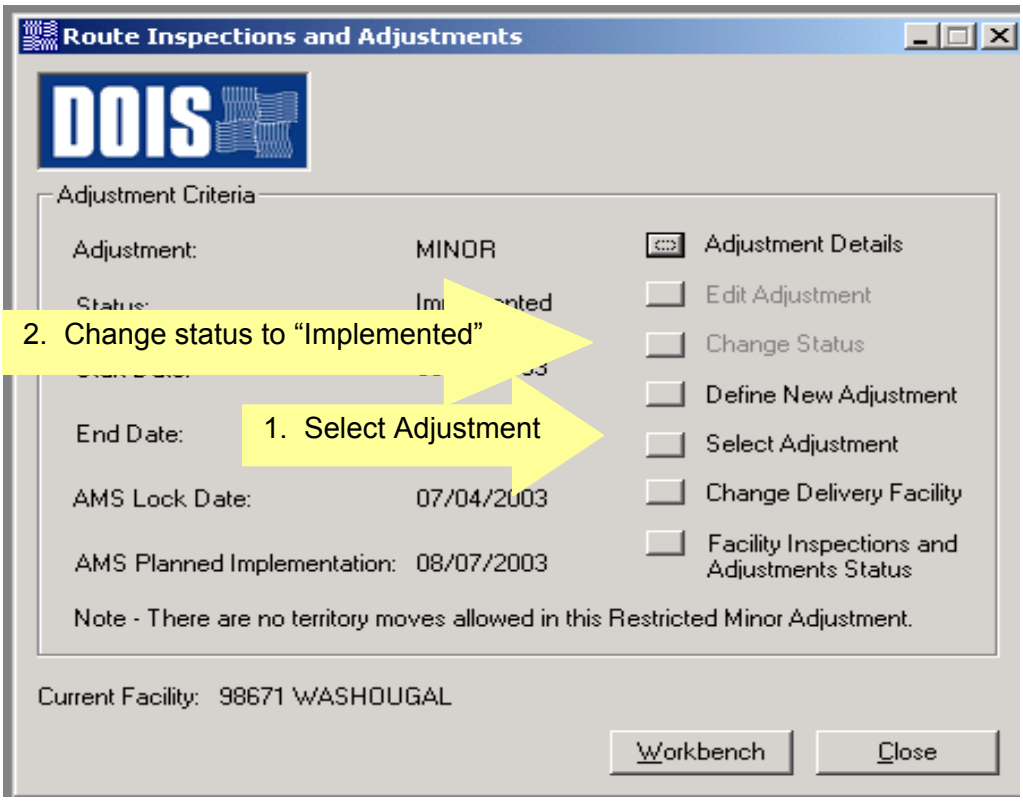
You may check the approval status by clicking on Facility Inspections and Adjustments Status from the Route Inspections and Adjustments main window shown in Figure 1. Once the route adjustment is approved, click on Submit to AMS.



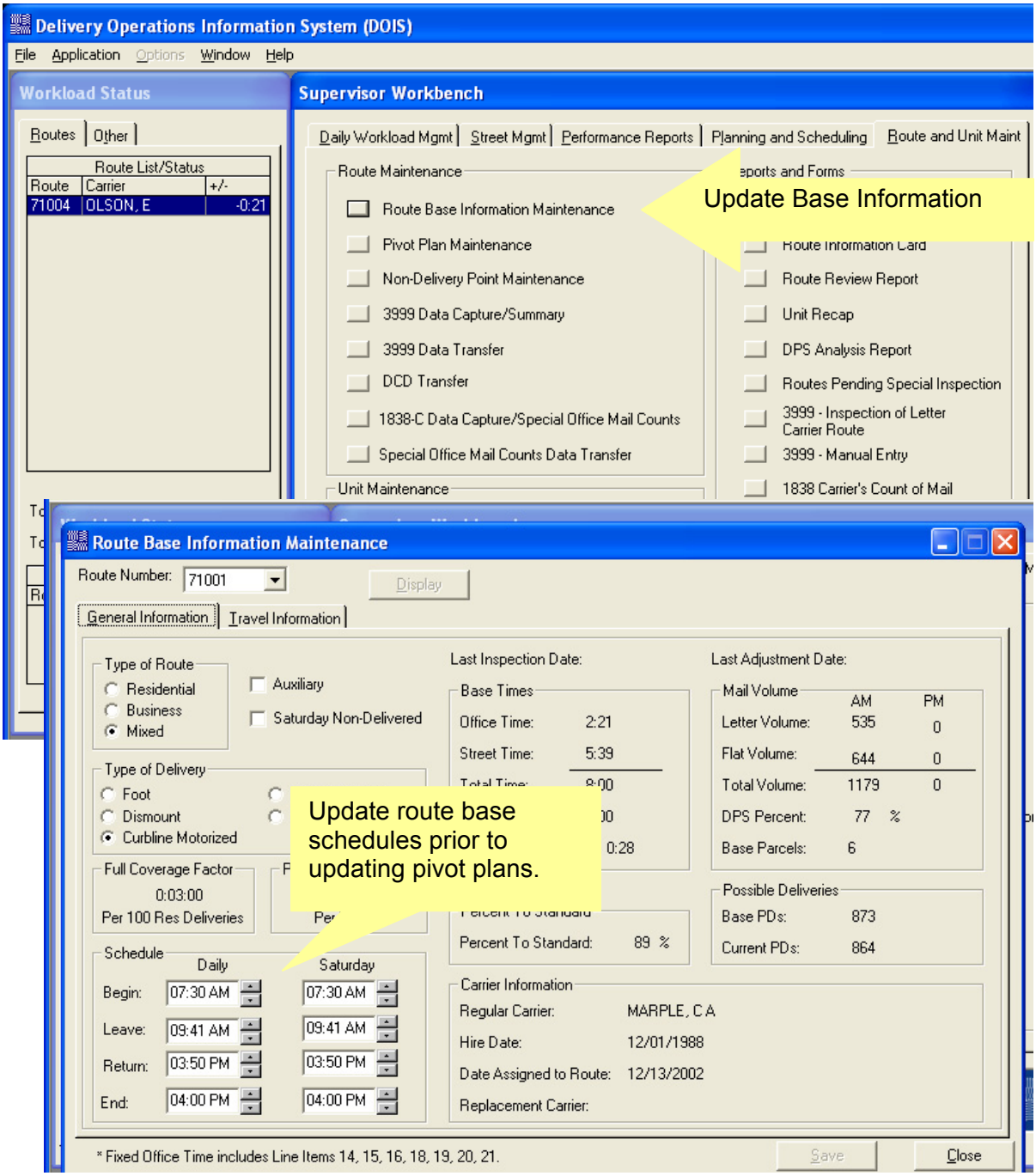
2.14 Implementation

Following approval and submission to AMS, you must select and implement the route adjustment the day prior to the scheduled effective date. Click on Select Adjustment and Change Status from the Route Inspections and Adjustments window.

In Plant Support must update sort plans the day prior to the adjustment effective date.



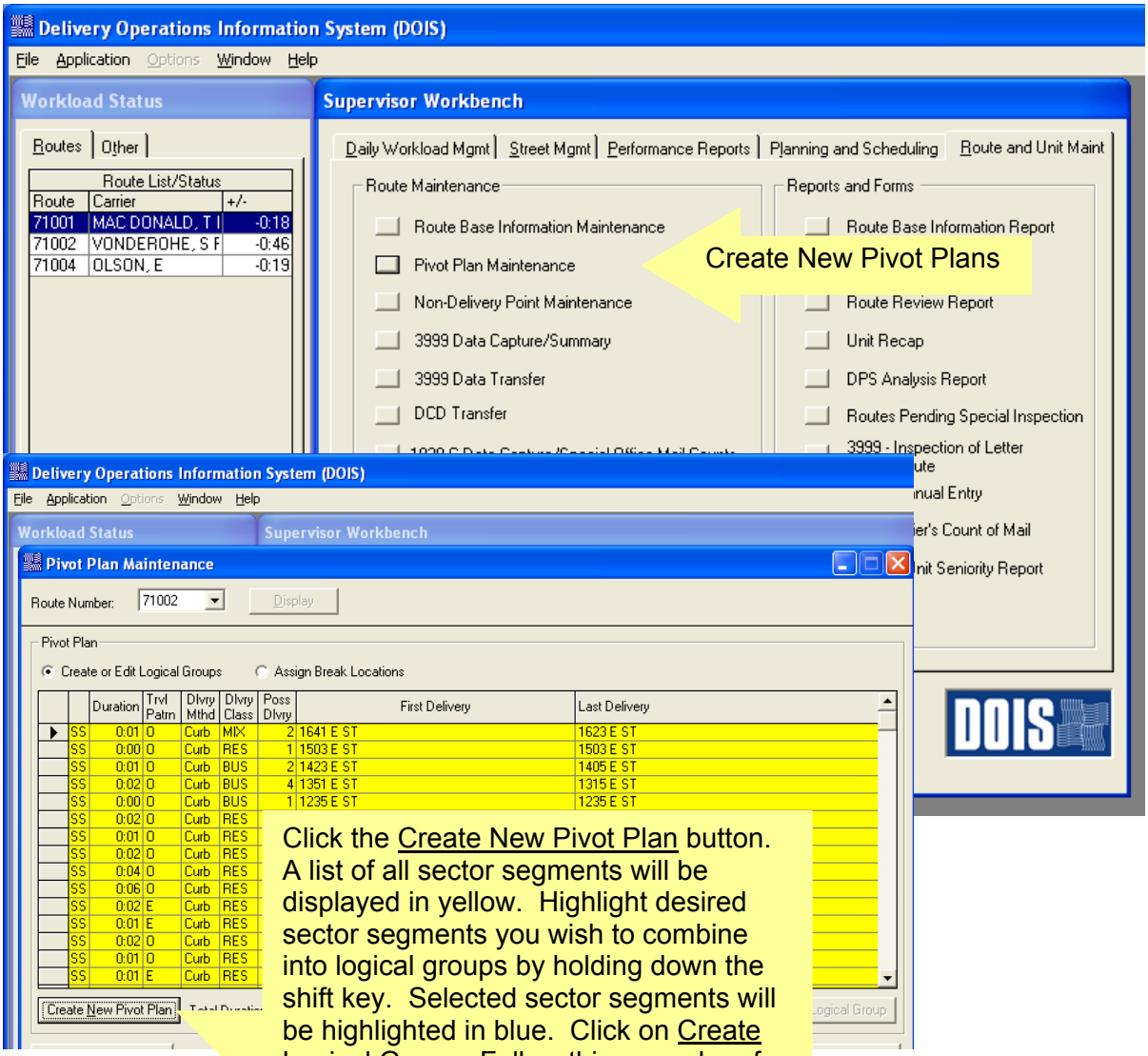
2.15 Route Base Information Maintenance



It is necessary to manually update route schedule times to reflect the new base data for all of the routes involved in the adjustment. This must be done prior to updating the pivot plans.

2.16 Pivot Plan Maintenance

Pivot Plans must be re-created after the new AMS file is in DOIS. Once you have verified that the new AMS data has come in to DOIS, and after entering the new route base schedules, the Pivot Plans and MSP Base Information must be updated. MSP points associated with territorial adjustments are removed and will have to be added manually. MSP scheduled times default to 12:00 AM for any routes involved in the adjustment. These times can be reset by creating new pivot plans for the affected routes. Click on Pivot Plan Maintenance.

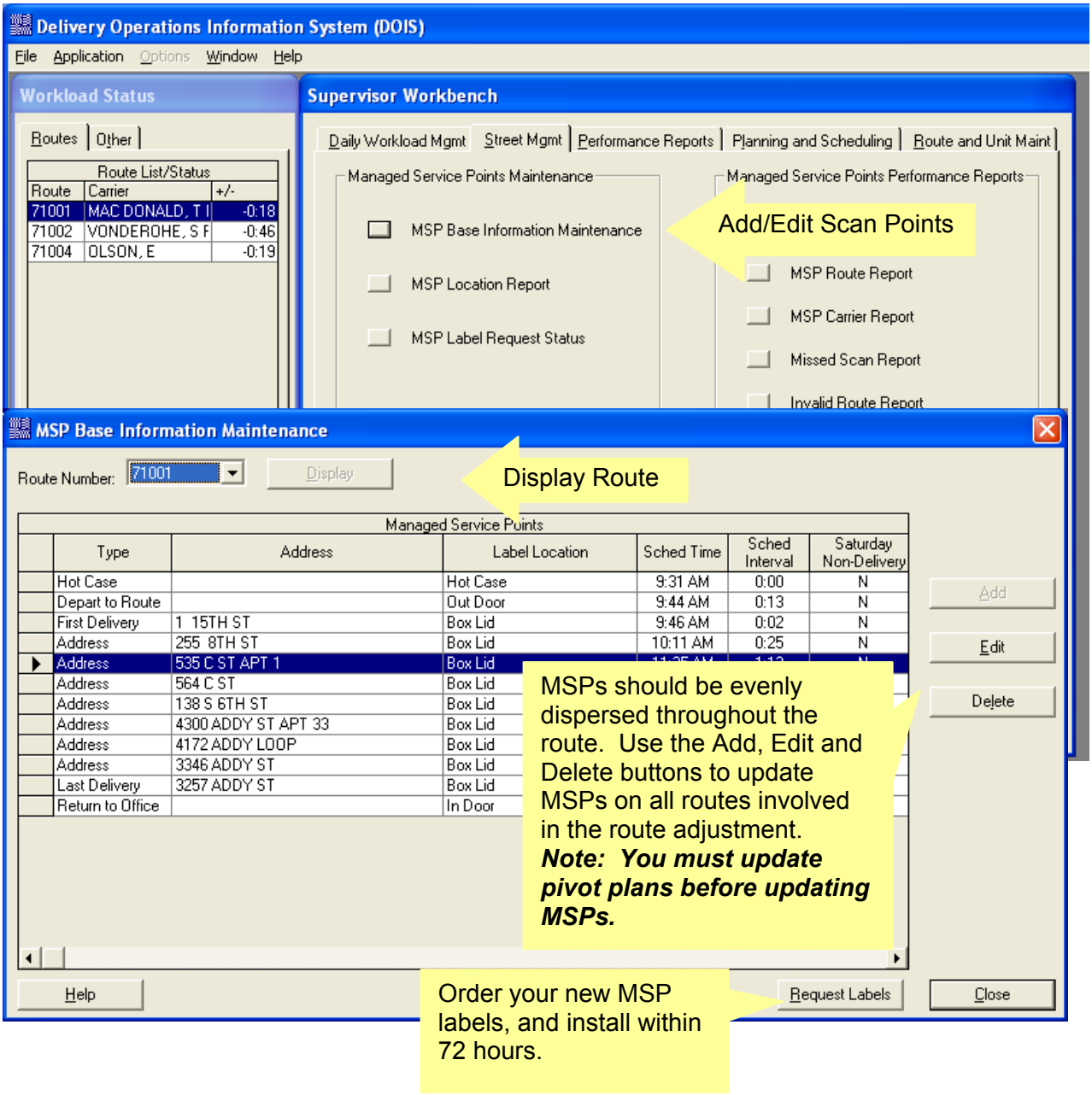


Click the Create New Pivot Plan button. A list of all sector segments will be displayed in yellow. Highlight desired sector segments you wish to combine into logical groups by holding down the shift key. Selected sector segments will be highlighted in blue. Click on Create Logical Group. Follow this procedure for all of the sector segments for each route involved in the route adjustment.

Note: For the most accurate Pivot Plan and MSP data, a new 3999 should be completed following the adjustment. After a new 3999 is completed, you will once again need to Create New Pivot Plan and review MSP Information.

2.17 MSP Base Information Maintenance

After updating pivot plan information, your last step is to go back and review MSP Base Information. If you still have not added MSP points to bring routes back up to the minimum of 4 street scans, you will need to do so now. If you exit out of a route with fewer than 4 street scans without adding scan points, ALL of the scan points for that route will be deleted. Under the Street Management tab, select MSP Base Information Maintenance.



Post-adjustment checklist

This is a quick list of items to check and functions to perform once a route adjustment has been implemented in DOIS. For more detailed information, refer to the document "Route Adjustment Process" on the DOIS web site.

1. Route Base Information Schedules: Every route's schedule must be updated to reflect the adjustment just implemented:
    a. BT (Begin Tour): Change as necessary
    b. ET (End Tour): BT + 8:00 + lunch
    c. RT (Return to Office time): ET - pm office time
    d. LV (Leave Time): RT - base street time - lunch

2. Pivot Plans: The pivot plan for every route must be re-created (including those that were not adjusted), in order to make use of the latest 3999 information. This action will adjust the MSP scheduled scan times as needed. For routes that were adjusted and that have territory that is not on the 3999, DOIS will have to estimate durations for that until a new 3999 can be done. (NOTE: If, during the pivot plan creation process, you find that old sector segments are still on the route, you will have to wait until AMS refreshes DOIS with the latest delivery point information, which occurs every Sunday, to re-do pivot plans.)

3. MSP labels: Once the adjustment has been implemented in DOIS, you must order new MSP labels for the maintenance that was done during the adjustment. You will have 3 days from when the labels were printed to deploy them and begin using them. The labels that are being replaced, or for territory that was moved, are immediately no longer active.

4. Update the Travel Information tab in the Route Base Information as needed, including, but not limited to:
    a. Base vehicle mileage
    b. Line of travel to and from the route
    c. Location where authorized to leave route for lunch
    d. Lunch and break locations

5. Update non-delivery point information for each route as needed.

6. 3999s: For routes that were adjusted, a new full 3999 should be done as soon as feasible, and then pivot plans re-created again. This will allow MSP to be as accurate as possible.