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Easy Rides® Utility

User Manual

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Chapter 1 - Using GoToMeeting 3

Chapter 2 - Installing Easy Rides 4

Chapter 3 - Setting Up Your Database 9

Chapter 4 - Mobilitat Geography 13

Chapter 5 - Entering Jurisdictions and Sites 16

Chapter 6 - Entering Qualifications & Personnel 18

Chapter 7 - Vehicles & Drivers – Entering Vehicles 23

Chapter 8 - Funders 26

Chapter 9 - Routes 27

Chapter 10 - Purposes 29

Chapter 11 - Fare Types 30

Chapter 12 - Rate Types 31

Chapter 13 - Providers 32

Chapter 14 - Clients & Attributes 33

Chapter 15 - DB List and Other Options 37

Chapter 16 - Reports 38

Chapter 17 - Global Options 47

Chapter 18 - Archive 52

Chapter 19 - Tools 54

Chapter 1

Using GoToMeeting

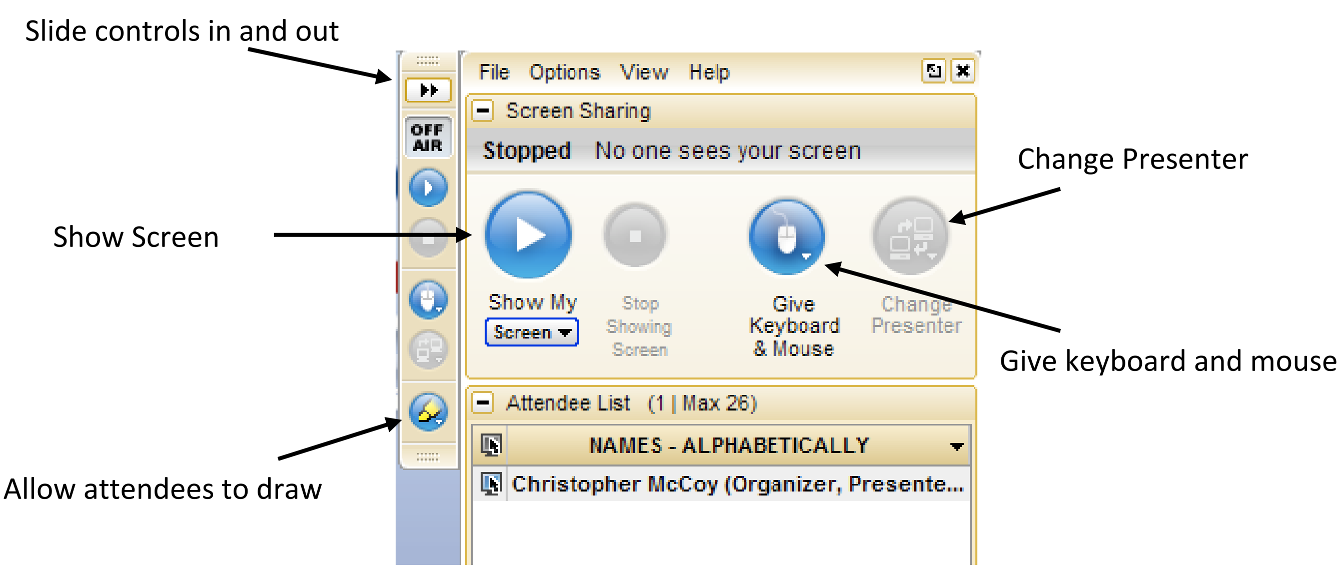
Your Mobilitat representative will set up a GoToMeeting on –line conference and send you an email with specific details.

Below are GoToMeeting instructions illustrating some of the functions and buttons you may want to familiarize yourself with.

Using GoToMeeting

1. Go to http://www.mobilitatsoftware.com/support in your Internet browser.
2. The Mobilitat representative will give you a meeting ID. Enter it in the GoToMeeting field and click the **Submit** button.

3. If this is the first time to access GoToMeeting, the application may take a few minutes to install. Answer Yes or agree to any prompts.
4. A pop-up box will prompt you for a name and email address. A name is all that is needed.
5. Once you join the meeting there will be a large tan colored area on the right side of the screen with various controls for you to use.



Note: Some controls pictured here may not be present unless you are the meeting presenter.

6. The presenter can **Change Presenter** and designate another computer to view. Once your computer is made the presenter, you can click the **Show My Screen** button once you are ready.
7. After clicking **Show My Screen**, the GoToMeeting control panel will display additional options. The Mobilitat representative may request you click the **Allow Attendees to Draw** button or **Give Keyboard & Mouse** button which will allow the Mobilitat representative to control your computer temporarily.

Chapter 2

Installing Easy Rides

Prior to installation discuss with your IT staff and implement a networking plan for the computers that will be using Easy Rides.

Minimum System Requirements

Equipment requirements vary according to the size and activity of the customer. Performance will improve with faster processing speeds and increased Random Access Memory (RAM). The workstations require resources to process the visual interface and the server requires resources to manipulate the data. Consequently, overall performance depends on capabilities of both the workstations and the server. The speed and stability of the network connectivity is also an important factor.

Workstation Hardware Requirements

- Intel Pentium processor at 2.0 GHz and 2GB Ram. 4GB Recommended for Vista.
- MS Windows XP Pro (will run in Windows 2000 Pro), Windows Vista Business or Vista Ultimate
- Microsoft Office Professional 2003 or later.
- 80 GB hard drive
- Available USB port
- CD ROM drive
- Network connectivity
- Recommended 19” or larger viewable screen monitor (scheduler and dispatcher), 17” viewable screen monitor (reservationist)
- Mouse or other pointing device

Server Hardware Requirements

- Intel Pentium (Dual core) processor at 2.0 GHz and 4GB Ram
- MS Windows XP Pro (will run in Windows 2000 Pro), Windows Vista Business or Vista Ultimate
- Microsoft Office Professional 2003 or later.
- 80 GB hard drive
- Available USB port
- CD-RW drive
- Network connectivity
- Backup media (CD R/W or tape)
- 17" monitor
- Shared or network printer
- Mouse or other pointing device

Notes

- Regarding Microsoft's Windows Vista, please note, Windows Vista Home versions (Basic and Premium) do **not** have some features Easy Rides requires. Make sure you purchase computers with either Windows Vista **Business** or Vista **Ultimate**.
- The server should not be a computer running as a Domain controller or as an MS Exchange server. Contact us if you have any questions about your server configuration.
- Some users may wish to use the server as both a server and a workstation, if this is the case you will need to meet the requirements for both the server and the workstation.
- For added performance we recommend purchasing additional ram for your systems.
- Mappoint 2006 or later required for EasyRides Plus.
- MS Access 2003 or later required for MS Access based customer driver manifests.

Installing Easy Rides on the Server

Normally, your Mobilitat Representative will install Easy Rides for you in case there are any unexpected technical obstacles with your network setup, but if for some reason you end up doing it yourself, follow these steps:

Go to http://www.mobilitatsoftware.com/ and select the **Downloads** tab.

Click "ER Auto Updater".

Enter the User Name and Password provided to you by Mobilitat (contact us at 888-806-6595 if you need help remembering them).

Choose to Save (do not select Open) and browse to C:\Program Files, click the "New Folder" icon.

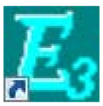
Name the new folder "Mobilitat" and click **Open**. Click **Save** to download the file.

Once the download is complete, select **Open Folder** (do not select **Run**). Launch **ER3.exe** (you may receive a Security Warning. Select **Run**). This will extract the necessary files and place the Easy Rides icons in the Mobilitat folder.

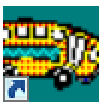
Delete "ER3.exe" and rename "ERAutoUpdate-new.exe" to "ERAutoUpdate.exe"

Right click the Easy Rides icon, highlight "Send To" and click "Desktop (create shortcut)".

Repeat this process with the Utility and Auto Updater icons.



Easy Rides

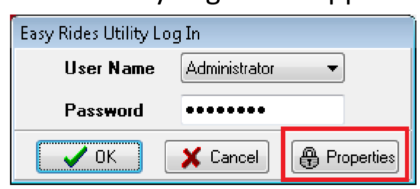


Utility – Reporting and system setup

Auto Updater – Automatically downloads ER updates

Please note, the person installing Easy Rides must have administrative privileges.

Once the software is installed, click on the Utility icon. The Easy Rides Utility Log In will appear. Click on the Properties button.



In the PROPERTIES section the Admin and User Password defaults to the word "password". This will provide the least secure environment, but enable all staff members to key in database information during set up. The passwords can be changed later to bring more security to the system.

Installation on client workstations may require the server name. To find the server name, go to the server:

- On Windows XP - Click the Start button then right click My Computer and choose properties. Select the computer name tab, Write down the server name.
- On Windows Vista – Click the Windows logo button ( ), right click Computer and choose Properties. Note the computer name.

Installing Easy Rides Back-Up on the Server Desktop

Easy Rides can only be backed up onto a hard drive on the server machine.
Go to http://www.mobilitatsoftware.com/ and select the **Downloads** tab.
Under Individual Downloads, click "EZBackup"
Enter the User Name and Password provided to you by Mobilitat (contact us at 888-806-6595 if you need help remembering them).
Choose to Save (do not select Open) and save to the Desktop.

This will place the EZBackup icon () on your desktop
You can create a shortcut to it from the workstations to the server's desktop. Make sure you have a back- up plan for daily, weekly and monthly back-ups. Mobilitat strongly suggests you have a written back up plan that includes off-site storage. (contact us at 888-806-6595 for more information or assistance).

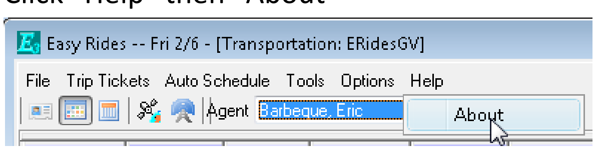
Installing Easy Rides on Client Stations

Ask your IT staff person to designate Mobilitat as a shared folder. Your contract states how many computers can simultaneously use Easy Rides. If you determine you need more client stations to have access to Easy Rides please call Mobilitat at 888-806-6595.

The IT person needs to send Easy Rides and Utilities shortcuts to each workstation authorized to use Easy Rides.
Please note that the person installing Easy Rides must have administrative privileges.
Again, you decide where to map the shortcuts to and where to keep your files.

What Version Are You Using?

To be able to have the most recent upgrade, you need to know what version you are using now.
To see the version you are using in Easy Rides, launch Easy Rides by double clicking on the Easy Rides icon.
Click "Help" then "About"



In this example we see version 3.0.27.3

Downloading From the Mobilitat Web Page or Accessing On-line Tutorials

Your system has been set up with a pre-set user and password name.

User name = e-mail address of your system

Password = key code

You may change these items by contacting the Mobilitat offices 888-806-6595.

Go to www.mobilitatsoftware.com

Congratulations, now you can get into the user features of the Mobilitat web pages.

Manuals

To print or save a copy of the user manual, go to the Mobilitat webpage.

Click on Downloads

Under “Manuals (Requires login)” section, select the manual you want to print or download

You will be asked for your username and password

- User name = email address of your system
- Password = key code

The document will appear as an Adobe PDF. You can print it or use the “save as” option to save it to your computer.

Video Tutorials

Training videos can be accessed at : http://www.mobilitatsoftware.com/support/training-videos.

Enter your username and password (contact us if you need help remembering them)

- User name = email address of your system
- Password = key code

Easy Rides Software

Upgrades are generally obtained by launching the Easy Rides Updater application on the computer but if needed can be downloaded from http://www.mobilitatsoftware.com/.

From the Mobilitat webpage, in the Downloads column,

Select the appropriate download

Enter your username and password

- User name = email address of your system
- Password = key code

Software is generally stored in C:\ Program Files\Mobilitat\

Chapter 3

Setting Up Your Database

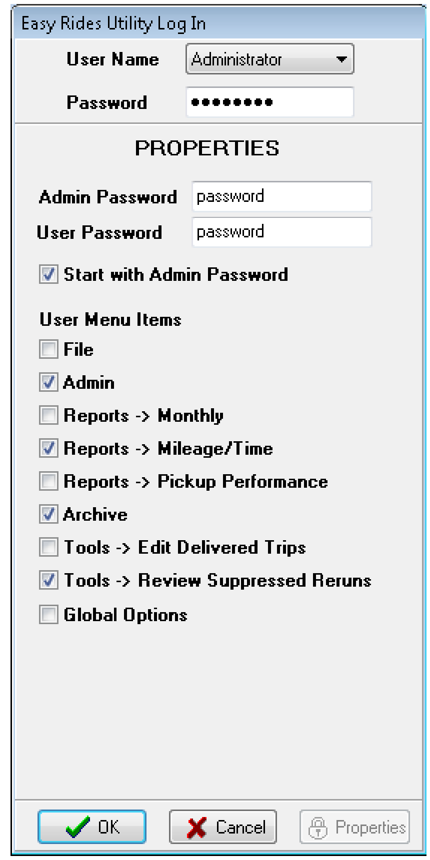
To enable schedulers to make quick reservations and to collect the information needed in reports there are a number of user defined fields that need to be set up. In other words, this is the time to think about what you want to report on so that you can make sure the necessary data is collected. Examples of items that will be customized for your system include a list of funders (organizations, foundations, grants) that pay for an individual's trips, purposes of your client's trips, providers, fare types, etc.

Customizing the Software to Meet Your Needs

Easy Rides associates this customized data with each rider, so it is necessary to set up fields prior to inputting client data to assure complete records.
Data will be customized in this order:

- Cities
- Sites (site miles/speeds)
- Zones
- Jurisdictions
- Vehicle event codes
- Vehicles
- Ethnic Codes
- Affiliations (mostly used by volunteer agencies or by fundraisers)
- Driver Event Codes
- Drivers & Volunteers
- Routes
- Providers
- Fare types
- Purposes
- Funders
- Fare Types
- Rate Types
- Age Groups
- Frequent delivery addresses
- Clients

Easy Rides Utility Security



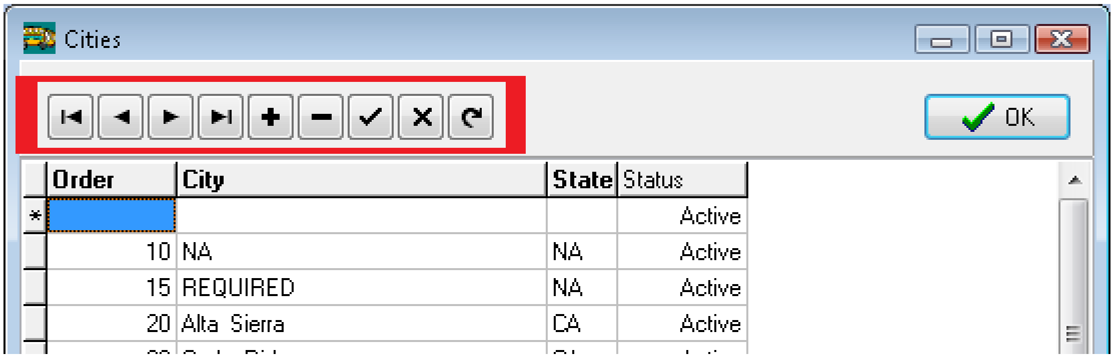
ER Utility has two levels of security, Administrator and User. When the Logon screen appears for the first time select:
User Name: Administrator
Password: password
Click on the properties button and enter new passwords for both Administrator and User. If you choose to have lower security, check the box entitled “Start with Admin Password”. This will cause all users to have access to all features of the Utility. If you want to restrict access to the portions of the Easy Rides Utility then do not put a check mark in front of “Start with Admin Password.” If you do intend to use security, then select the features you wish to make available to the User. The Administrator has the responsibility to determine the appropriate level of security for each Easy Rides user. A password must be set for each User and their machine.

Items Common to all Tables

We are using the “Cities” table for this example; however, all of the tables have a tool bar just like the one indicated in red.

Clicking on the first icon will place your cursor in the top row of the table

- The second icon places your cursor one row up
- The third icon places your cursor one row down
- The fourth icon places your cursor in the last row of the table
- The plus sign adds a row so that you can add items to a table, in this case a City
- The minus sign deletes the highlighted row
- The check mark posts all items to your data base
- The x mark will delete the last entry
- The curved arrow will refresh the data

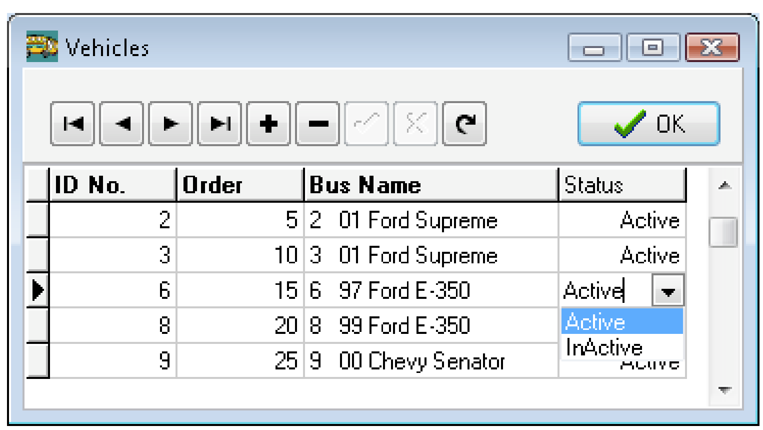


The Order Column

Items in the table can be put in any order you want them. By numbering the items in numerical sequence the table items will stay in the order you place them. By putting the same number in front of the items in your table, the items will automatically fall into alphabetical order.

Putting two groups of items in two alphabetical groups in one table can be done by placing the same number in front of a group (like cities in one county) and then placing a different number in front of another group (like cities in county number two). Note: it is important to leave unallocated number space between entries to allow for future growth. In this instance there are 9 other listings that could be inserted between Aumsville and Aurora because there are 9 numbers available between 20 and 30.

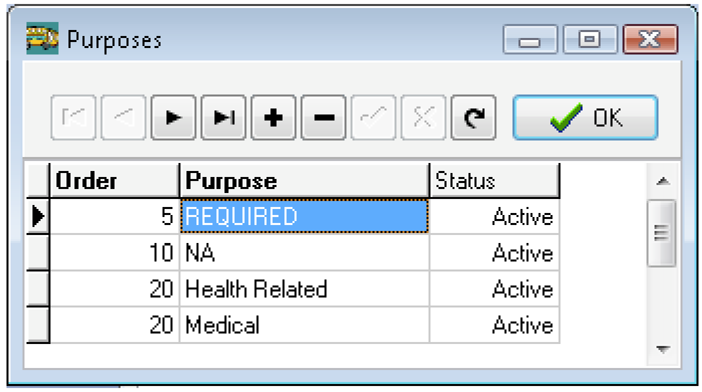
Status Column



Vehicles can be changed from Active to Inactive right in the Status Column.

By choosing “Inactive” a particular bus will no longer be available to be chosen by a dispatcher. Never delete a bus or any other item in your database without giving it serious thought. A vehicle might not be in your fleet any longer, but the vehicle was still used to deliver rides last year. That information is still needed to get accurate reports for past rides.

Key Words "REQUIRED" and "NA"



There are two important key words used in the tables: "REQUIRED" and "NA". If "REQUIRED" is present in the top row of the table, it will force a selection to be made at the time that a trip ticket is created. If the scheduler fails to input data in a required field it will not let them proceed to the next screen until a selection is made.

If "NA" is selected that means the data is "Not Available" or "Not Applicable" and indicates the field is not required to complete the trip ticket. This occurs when a database item is not required for collection, for reports or not applicable to the system.

Each table should be adapted to appropriately include either REQUIRED or NA. Upcoming sections will make recommendations to include or exclude these elements.

Chapter 4

Mobilitat Geography

Defining Service Boundaries

Mobilitat staff will work with you to identify your service area on a map.

Consider:

- What is the farthest you will go in delivering trips?
- Are there places where you may deliver riders, but not pick up riders?
- Does your organization's charter or letters of incorporation define the service area?
- Is there service outside of the boundary, for example, might you serve ¾ of a mile outside the city limits?

All the transit system – This would include all places that the transit system goes. It could include multiple jurisdictions, cities, zones and sites. Some systems may serve just one city or community; others may operate in multiple cities, towns, and counties. If no geographic subset is specified for reports all rides provided by the transit system are displayed.

Jurisdiction- You will define jurisdictions which are used in reports. A jurisdiction could include multiple cities, zones and sites. This may be a county or a congressman's district. Every transit provider will have at least one jurisdiction. It could be as simple as "Our Service Area" or "Sweetwater County". Jurisdictions are helpful for reports on a geographic area that may have multiple funders. A county government wants to know the number of trips for local residents, or a system wants to report on rides within a congressman's district for funds to buy buses.

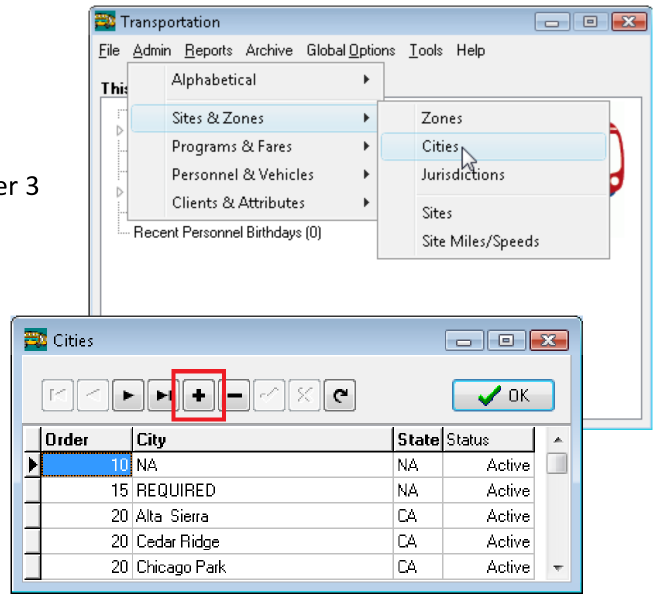
City – An area defined by local and state officials with a legal boundary. A city could include multiple zones and sites. Cities are always included in the address of a client, but some client's actual location may be outside the official borders of the city though their mailing address includes that city's name.

Zone – A collection of geographic sites which are color-coded for the dispatch board. This is an approximate area that one bus would cover geographically during normal daily operations. Zones are used to help dispatchers schedule trips, and get the closest bus to the rider.

Site – Sites are the smallest geographic element described in the software. One or more sites are combined together to make zones. In urban areas a site might be the distance it takes the bus to travel in about 5 minutes, in less densely populated areas a site may be an area driven by a bus in 20 or more minutes. Sites are used most frequently when the transit provider has automated dispatching.

Entering Cities and Zones

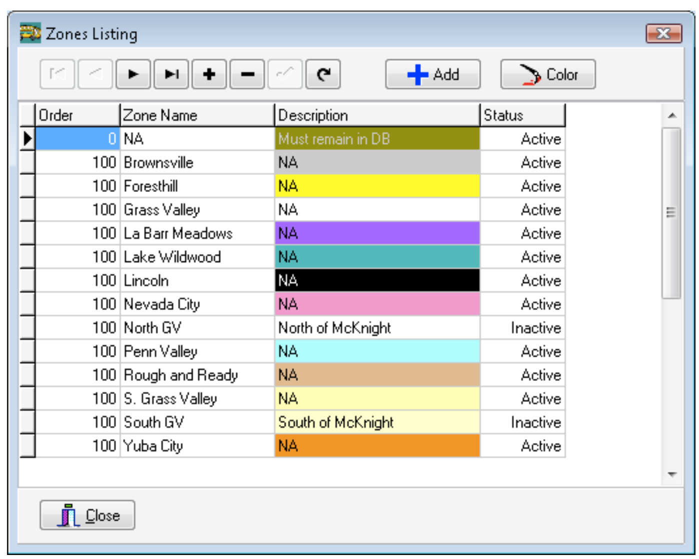
Entering Cities



Open Easy Rides Utility, click on Admin, “Sites and Zones” then Cities.

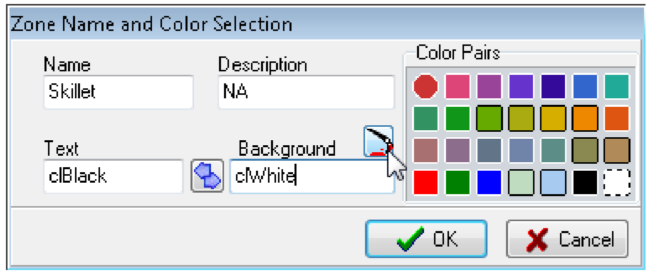
Click on the Plus sign and an empty row appears
Enter an order number (see notes above in Chapter 3 “Items common to all tables”).
Enter City name and State.
Make sure that “Active” appears under the Status Column.
After you have entered all the Cities, click the OK button to post all the items just entered into the data base.
RECOMMENDATION: Mobilitat suggests you have the first row designated as N/A for non-ride tickets which will be discussed in the Easy Rides Manual.

Entering Zones



Click on Admin, “Sites and Zones” then Zones
The Zone table is shown at right. Zones provide color coding for geographical areas.
RECOMMENDATION: “REQUIRED” should not be included in this table. Assure that NA is included as the first option for Zones.

As each zone is added, select a color from the palette on the right or click inside the "Background" field to display the color button. Clicking the color button offers additional color choices.



Editors Note:
The zones and site tables require planning and much discussion. Please take the time to understand this process with your trainer. Correctly identifying sites and zones will help your system save time and gas in the future.

Colors

Zone colors can be changed at any time. Generally zones with a pastel back ground and dark lettering are the easiest to read for the majority of the population.

Zones that you would like to stand out might be a dark color with white print, for instance a zone that has you traveling a great distance. All rides to that site should be carefully considered and coordinated.

Chapter 5

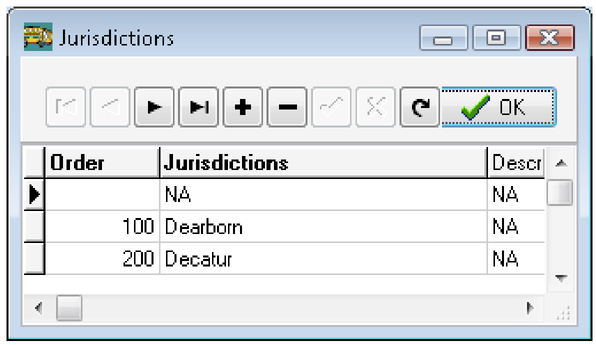
Entering Jurisdictions and Sites

Entering Jurisdictions

Click on Admin, “Sites and Zones” then Jurisdictions

Jurisdictions are set up if your system needs to report to both City Mayors and County Commissioners. Generally the County Commissioners would like a report on all the rides given to rural residents; choose to enter various Jurisdictions.

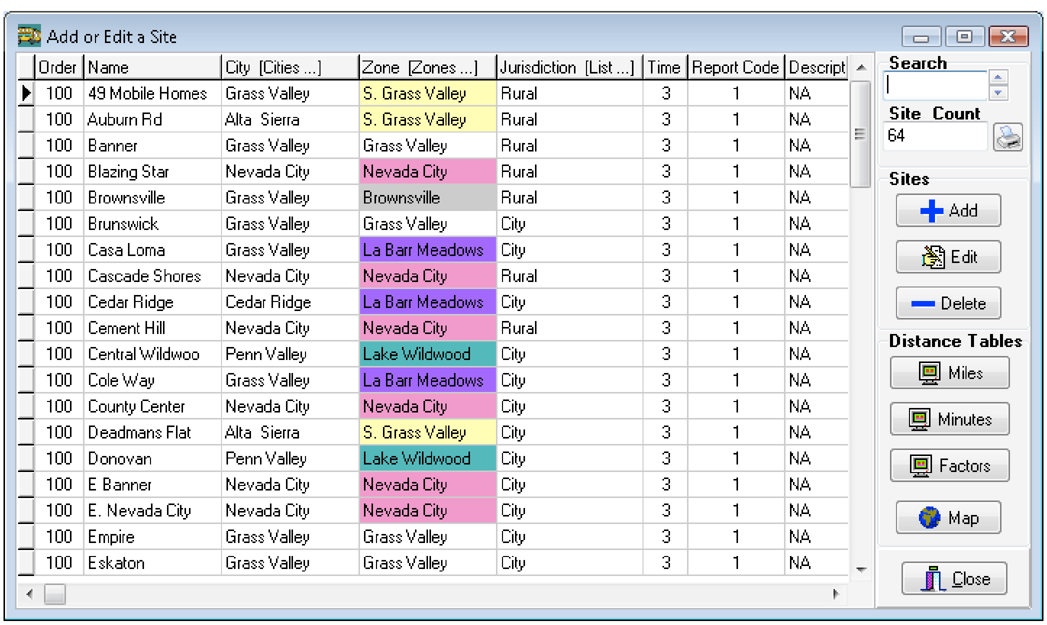
If Green River and Rock Springs are both in Sweetwater County; the Mayor of Rock Springs may want a total of all the rides given in Rock Springs and the Mayor of Green River will request a total of all the rides you do for the City of Green River. If you want to get funding from the Sweetwater County Commissioners, you will need to be able to give them a list of all the rides originating or ending in all other areas outside the city limits of Green River or Rock Springs.



RECOMMENDATION: Include the option of having NA in this table.

Entering Sites

Click on Admin, “Sites and Zones” then Sites



Each Site must be associated with a City, zone and Jurisdiction.

RECOMMENDATION: REQUIRED should not be listed as an option. NA can be included as an option for unusual circumstances.

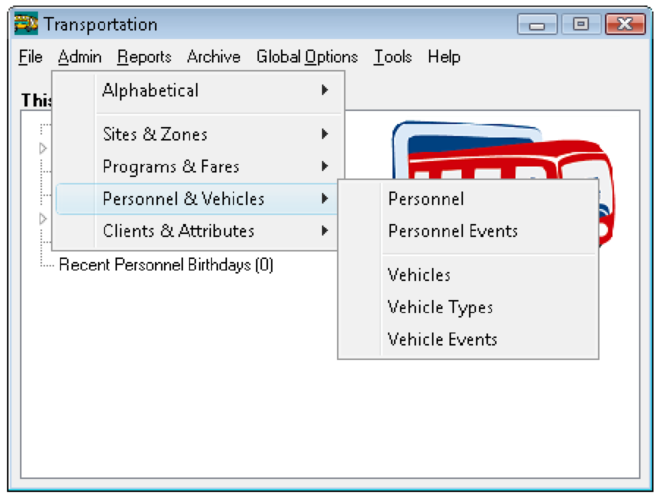
After you set up Easy Rides, and your business grows, you may have a change to the geographic area you serve. You need to make sure you not only add any new city but that you also associate that city with a new site and choose zone and jurisdiction from the “Enter Site Information” screen. Once you have input these relationships your reports will accurately reflect the trips you have provided from the expanded service area. If you do not set up the relationships of new city, new site, zone and jurisdiction your reports will be inaccurate.

Chapter 6

Entering Qualifications & Personnel

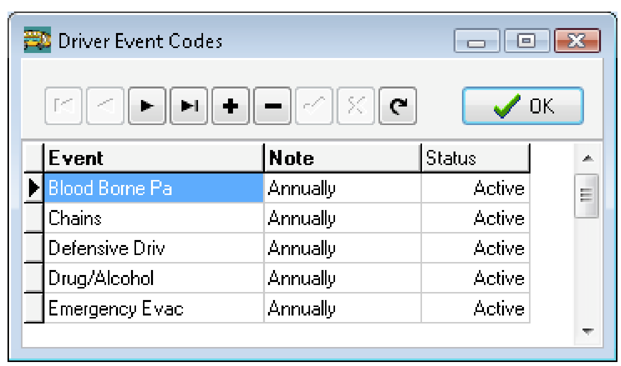
Entering Qualifications

One of the most valuable resources for quality transportation is great drivers and dispatchers. EasyRides has several tools that enable transportation providers to keep important information about their personnel and provide alerts to remind system managers when certifications or other documentation is due. This section can be found by the following: Click on Admin, Personnel & Vehicles then Personnel Events



Qualifications will need to be tailored to each system's unique needs. An event is defined as the date when documentation for a driver needs to be in the office. For example:
The date that the driver's renewed commercial driver's license is due,
The date when passenger assistance training was completed, or
The date when the driver was fully inoculated against hepatitis

To the right is a screen shot of events codes for a transportation system. When you first see the Qualifications screen it will be empty of data. Use the "+" key to add a new line for each event drivers will need to have documented. By completing this step you will then be able to have meaningful choices when you start to key in the information on each particular person. Remember to add more events as regulations change and to update the dates due for events once they've been reached.



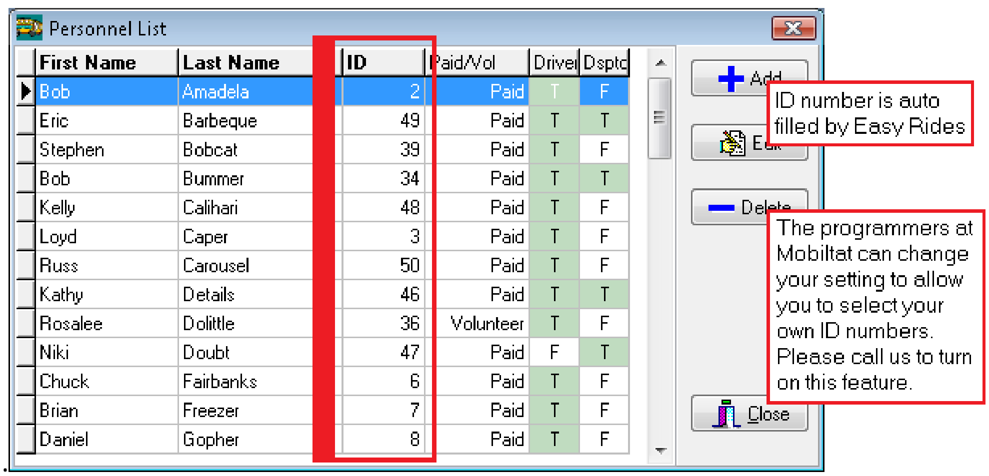
For example, once you have proof that the driver has renewed the CDL, you need to put a date in the person's record that will show when the CDL renewal is next required.

Entering Personnel

Once you have defined the items you want to be reminded about with drivers, you are ready to input information about the drivers on their Driver/Volunteer Record.

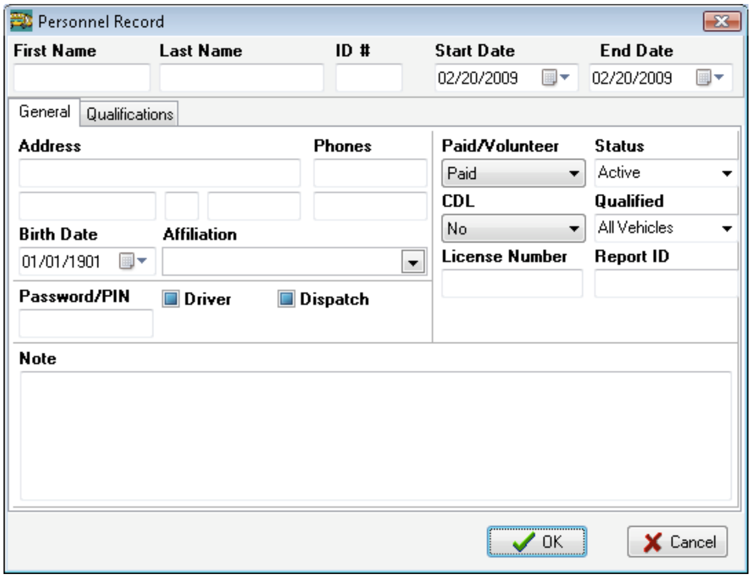
Click on Admin, Personnel & Vehicles then Personnel

You may have much of the information that is needed collected in personnel files or volunteer files. Sometimes this data is in many different files. To simplify the process of collecting and inputting this Mobilitat has designed a handy Sample Personnel Data Collection Sheet which you can adapt for your own system. To see a copy of the Sample Personnel Sheet go to the [end of this chapter] or on our web page at: http://download.mobilitatsoftware.com/setup/sample_drivers.pdf.



First Name	Last Name	ID	Paid/Vol	Driver	Dsptc
Bob	Amadela	2	Paid	T	F
Eric	Barbeque	49	Paid	T	T
Stephen	Bobcat	39	Paid	T	F
Bob	Bummer	34	Paid	T	T
Kelly	Calihari	48	Paid	T	F
Loyd	Caper	3	Paid	T	F
Russ	Carousel	50	Paid	T	F
Kathy	Details	46	Paid	T	T
Rosalee	Dolittle	36	Volunteer	T	F
Niki	Doubt	47	Paid	F	T
Chuck	Fairbanks	6	Paid	T	F
Brian	Freezer	7	Paid	T	F
Daniel	Gopher	8	Paid	T	F

The Personnel template (below) allows you to enter information on all personnel including drivers, dispatchers, schedulers, customer service representatives and volunteers. This part of the database is where you will also designate passwords for staff allowed to access the program. Simply place a check in the box next to Dispatch. When the staff person logs in for the day, she will choose her name on the Dispatch Center. Activities performed by this person on trip tickets will be recorded for future reference. (See Easy Rides Manual for more information).
To enter a staff member click add. The following screen will be displayed.



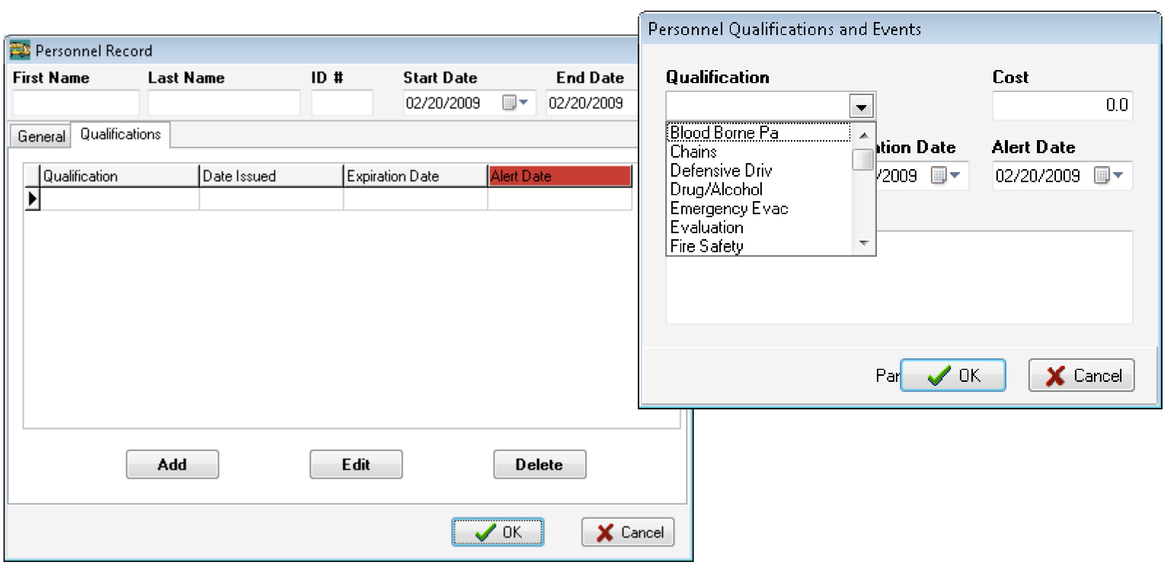
There are two tabs on the screen: General (displayed above) and Qualifications.

Please note: the password section of the Personnel record is only recorded in this one spot and cannot be accessed easily. It is important to make sure system administrators are aware of passwords for all employees.

Personnel Qualifications

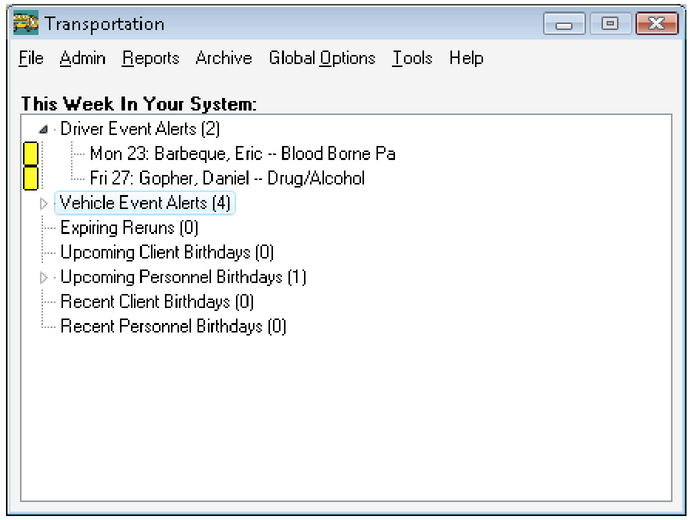
The second tab of the Personnel Record includes the qualifications associated with event codes. Click "Add" to add qualifications for the person. As you can see in the drop down box below, the qualification list contains the same elements as the driver event codes.

Complete the information for each person including all their qualifications, qualification expiration and the date an alert is to appear in EasyRides reminding of the expiration.



Once completed, each person will have the information documented to make sure they have the requirements to do the job. A list of the qualifications and associated dates will appear in each person's record.

When an event comes due, a notice will appear on the EasyRides Utility board when a user first signs in. The Driver Event alerts will display on the screen (see sample at right) until the dates for the event are changed.



Sample Personnel Data Collection Sheet

Name: ____

First Last

Hire Date: ________________________

Month Day Year

Home Address: ____

Street City State Zip

Home Phone #: _______________________ Cell Phone # :___________________

Check One: ☐Scheduling Agent ☐Paid Driver ☐Volunteer Driver

Vehicles Certified to Drive: ☐N/A ☐All ☐12 Psngr ☐15 Psngr ☐24 Psngr ☐50 Psngr

CDL? ☐Yes ☐No

Birth Date: _____________________ License #: ___________________________

Affiliations: ____

Code: ___________________________ Password: _________________________

Notes:____

Adapt the following table to include the items your system tracks for each individual.

EVENTS & DATES – FOR THIS INDIVIDUAL

Qualifications	Date Issued	Date Expires	Alert Date	Notes
CDL				
DOT Physical				

Continue on reverse as needed.

Chapter 7

Vehicles & Drivers – Entering Vehicles

NOTE: The words “Vehicle”- and “Bus” are used interchangeably throughout this chapter.

EasyRides associates buses with drivers and trips. One of the important features of the software is the inclusion of cross checks of the data that insure a scheduler does not assign an individual to a bus that is inappropriate for that individual. For example, a warning message will display if a rider, using a wheelchair, is assigned to a bus lacking any wheelchair stations.

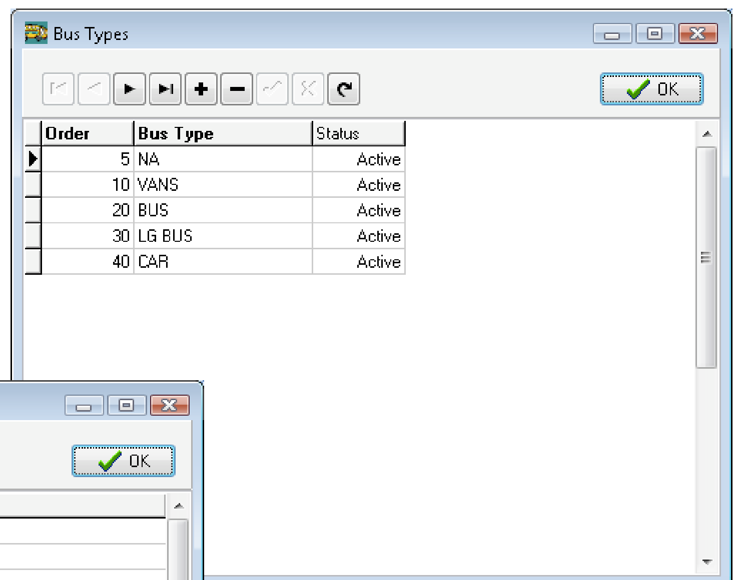
In this portion of the Utility software you will set descriptive information about your buses. This includes passenger capacity, VIN numbers, and much more. Many system managers find this information to be a helpful resource when there is a need to reference insurance information.

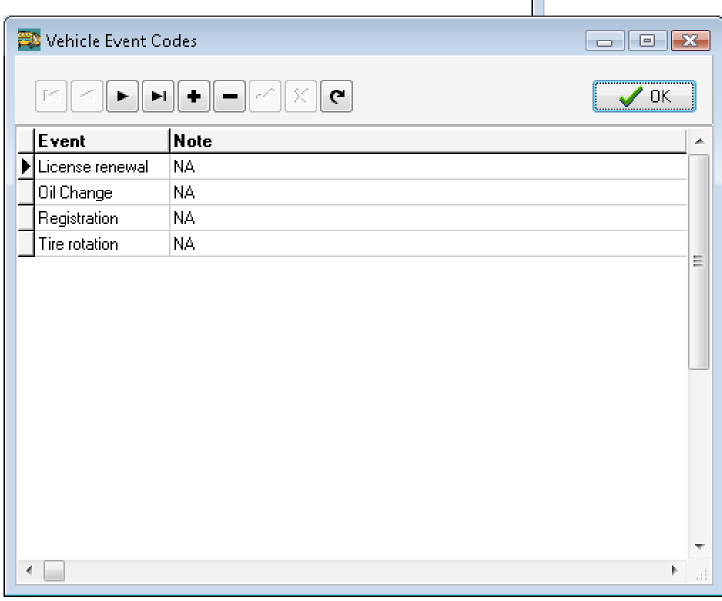
Enter Data about Buses

Click on Admin, Personnel & Vehicles then Vehicle Types

The different types of vehicles are entered here

RECOMMENDATION: NA can be included as an option for unusual circumstances.



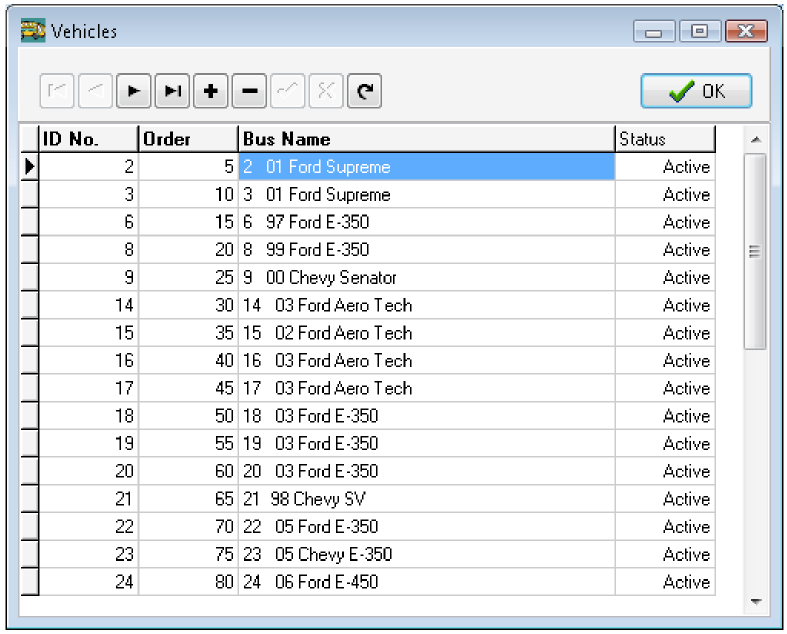


Click on Admin, Personnel & Vehicles then Vehicle Events

Enter all the vehicle events you want to keep track of.

Click on Admin, Personnel & Vehicles then Vehicles

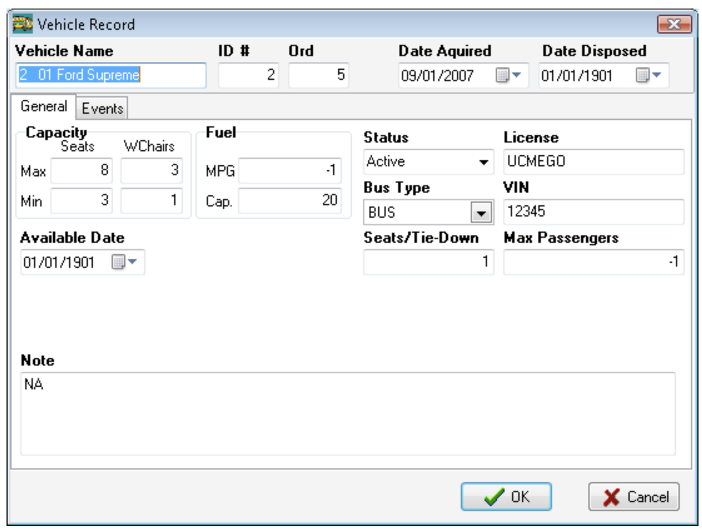
Use the Vehicles Table to input each bus you operate in your system.



ID No.	Order	Bus Name	Status
2	5	2 01 Ford Supreme	Active
3	10	3 01 Ford Supreme	Active
6	15	6 97 Ford E-350	Active
8	20	8 99 Ford E-350	Active
9	25	9 00 Chevy Senator	Active
14	30	14 03 Ford Aero Tech	Active
15	35	15 02 Ford Aero Tech	Active
16	40	16 03 Ford Aero Tech	Active
17	45	17 03 Ford Aero Tech	Active
18	50	18 03 Ford E-350	Active
19	55	19 03 Ford E-350	Active
20	60	20 03 Ford E-350	Active
21	65	21 98 Chevy SV	Active
22	70	22 05 Ford E-350	Active
23	75	23 05 Chevy E-350	Active
24	80	24 06 Ford E-450	Active

Data to Complete Bus Worksheets

Vehicle Name
Maximum Capacity
Minimum Capacity
Maximum Wheel Chair Capacity
Minimum Wheel Chair Capacity
Date Acquired
Date Disposed
Date available for operation
MPG
Fuel capacity of the vehicle
Bus Type
Vehicle License Number
VIN
Notes
Whether the status is active or inactive

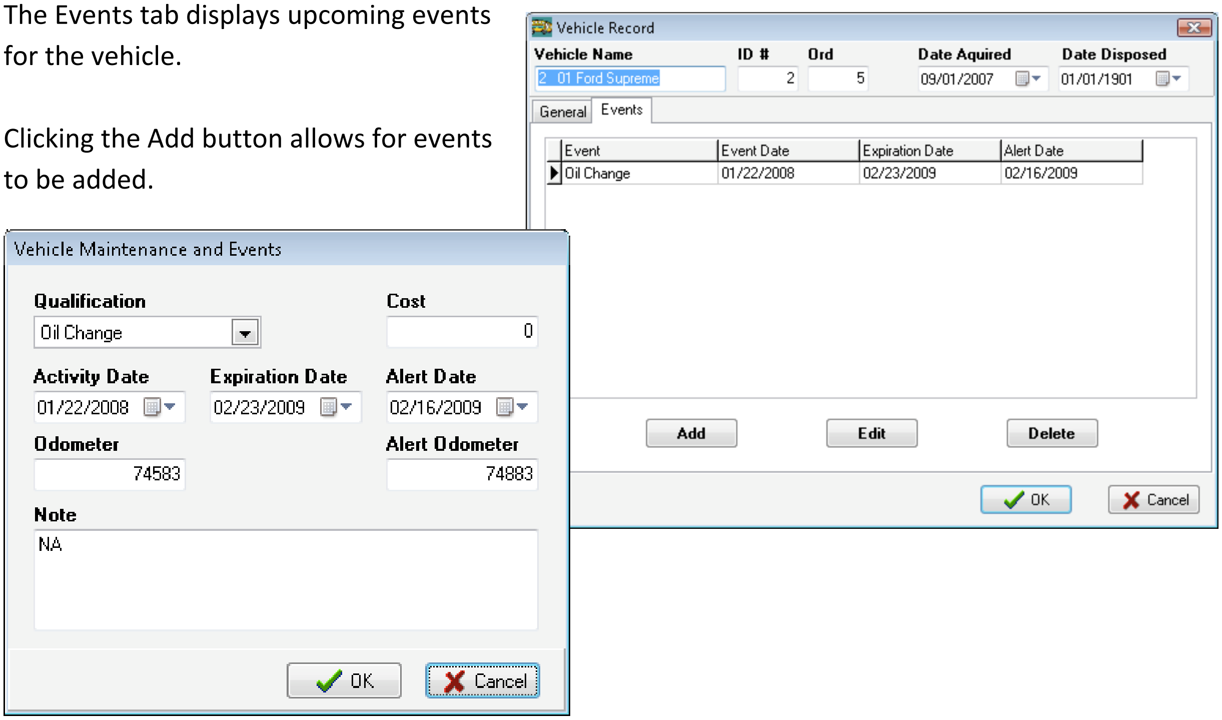


Please note, it is preferable to make a vehicle inactive rather than delete the entire vehicle data. Since trips provided are assigned to a vehicle, if a vehicle's data is deleted, all associated trips provided will be inaccurately reported.

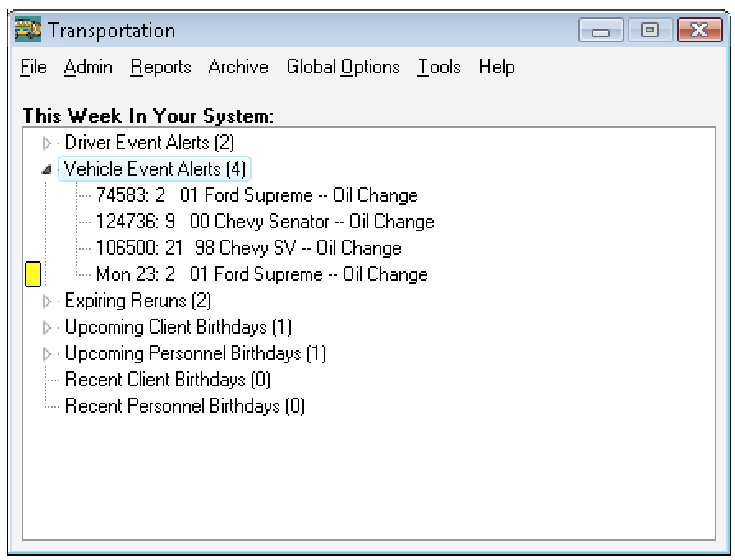
Note: You must fill in vehicle capacity fields in order for Automated Scheduling features to be enabled.

The Events tab displays upcoming events for the vehicle.

Clicking the Add button allows for events to be added.



When an event comes due, a notice will appear on the EasyRides Utility board when a user first signs in. The Vehicle Event alerts will display on the screen (see sample at right) until the dates for the event are changed.



Chapter 8

Funders

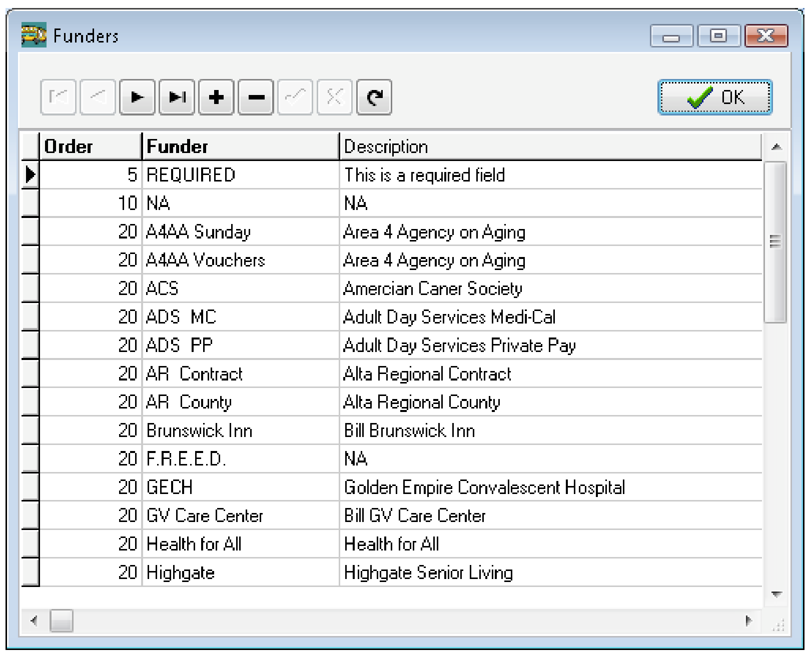
In this portion of the Utility software we will set descriptive information about the agencies, organization and individuals who fund each ride. This includes addresses, phone numbers, contact information and much more. Many system managers find this information a helpful resource when needing to contact a funding source and as a reminder when the next contract renewal is upcoming.

Enter Data on Funders
Click on Admin, Programs & Fares then Funders

Funders are agencies that provide agencies payment for services.

Typically you need to send reports to these funding agencies letting them know the number of rides you provided for them. Some agencies require not only the number of rides you gave to their clients, but confirmation they went and the days their clients rode. Easy Rides will make your bill process quick and easy.

Remember it is easy to add a funder, and just as easy to make a funder inactive. Do not delete funders, or you could risk the accuracy of your data.



Order	Funder	Description
5	REQUIRED	This is a required field
10	NA	NA
20	A4AA Sunday	Area 4 Agency on Aging
20	A4AA Vouchers	Area 4 Agency on Aging
20	ACS	Amercian Caner Society
20	ADS MC	Adult Day Services Medi-Cal
20	ADS PP	Adult Day Services Private Pay
20	AR Contract	Alta Regional Contract
20	AR County	Alta Regional County
20	Brunswick Inn	Bill Brunswick Inn
20	F.R.E.E.D.	NA
20	GECH	Golden Empire Convalescent Hospital
20	GV Care Center	Bill GV Care Center
20	Health for All	Health for All
20	Highgate	Highgate Senior Living

Secondary Funders

The Secondary Funders table is used for tracking multiple funders. A Secondary Funder may be listed in the same manner as the Funders. The secondary funders are used by the transit system when trip information must be sent to two or more different agencies.

Chapter 9

Routes

In this portion of the Utility software we will set descriptive information about the Columns in the dispatch table. Please do not name the column a bus name or a driver name. This will only confuse the dispatcher should that driver or bus be out of service on any given day. Fun names have been given to routes such as “Blue Goose Route” or in Alaska they have “The Moose” and the “Elk Run”. Some transit systems name their routes A,B,C,D, etc. Whichever way you choose, please remember a route is a combination of a driver and a vehicle delivering a number of trips.

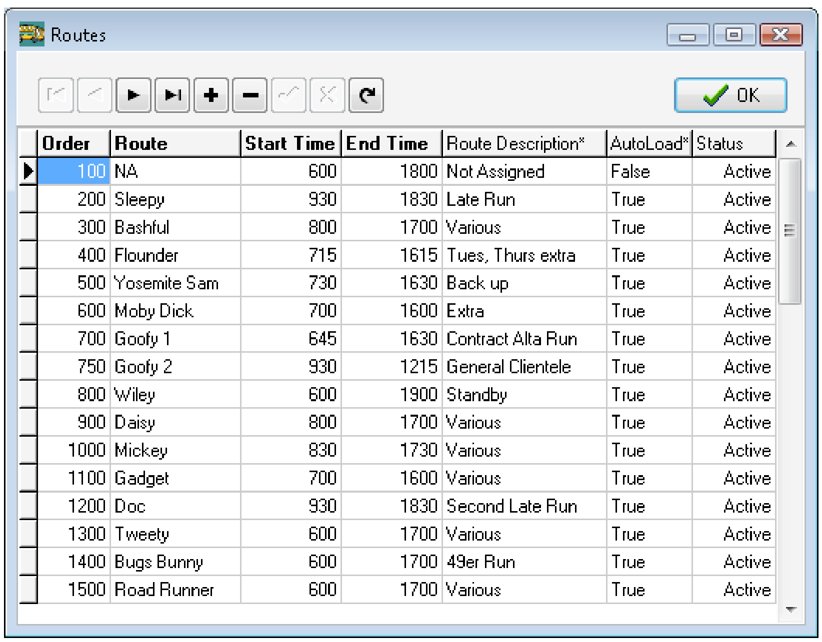
Set up Routes

Click on Admin, Programs & Fares then Routes

“NA” should always be the first item in the Route Table.

“REQUIIRED” should NOT be included in the table. Easy Rides will always require either “NA” or a Route Name

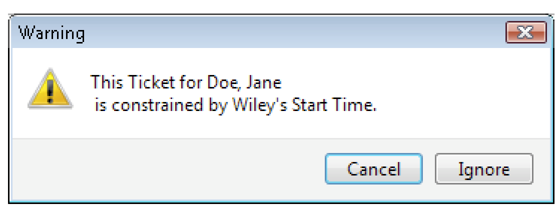
In the example given, the transit system decided to name their Routes after fictional characters. etc.



Order	Route	Start Time	End Time	Route Description*	AutoLoad*	Status
100	NA	600	1800	Not Assigned	False	Active
200	Sleepy	930	1830	Late Run	True	Active
300	Bashful	800	1700	Various	True	Active
400	Flounder	715	1615	Tues, Thurs extra	True	Active
500	Yosemite Sam	730	1630	Back up	True	Active
600	Moby Dick	700	1600	Extra	True	Active
700	Goofy 1	645	1630	Contract Alta Run	True	Active
750	Goofy 2	930	1215	General Clientele	True	Active
800	Wiley	600	1900	Standby	True	Active
900	Daisy	800	1700	Various	True	Active
1000	Mickey	830	1730	Various	True	Active
1100	Gadget	700	1600	Various	True	Active
1200	Doc	930	1830	Second Late Run	True	Active
1300	Tweety	600	1700	Various	True	Active
1400	Bugs Bunny	600	1700	49er Run	True	Active
1500	Road Runner	600	1700	Various	True	Active

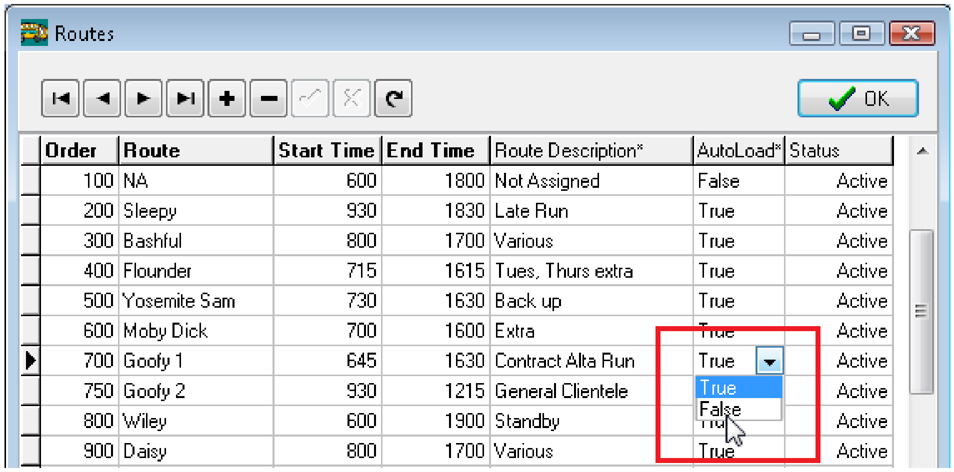
Each Route must have a start and end time. Routes can be given a min of 1, representing one minute after midnight to a maximum of 23:59, representing one minute to midnight.

Easy Rides will flash a pop-up message should you try to schedule a ride prior to the routes start time.
Easy Rides will also flash a pop-up message should you try to schedule a ride after that route has finished for the day.



Auto Load & the Dispatch Board

The AutoLoad feature tells the dispatch board to automatically load the route each time a dispatch board is opened. The default of this field is True. If the route cell is changed to False, then the dispatcher has the option to load that route only on the days that route may be running. For example you may only have R-9 running on Saturdays. More information will be available on this topic in the Dispatch Board section of the manual.



Order	Route	Start Time	End Time	Route Description*	AutoLoad*	Status
100	NA	600	1800	Not Assigned	False	Active
200	Sleepy	930	1830	Late Run	True	Active
300	Bashful	800	1700	Various	True	Active
400	Flounder	715	1615	Tues, Thurs extra	True	Active
500	Yosemite Sam	730	1630	Back up	True	Active
600	Moby Dick	700	1600	Extra	True	Active
700	Goofy 1	645	1630	Contract Alta Run	True	Active
750	Goofy 2	930	1215	General Clientele	True	Active
800	Wiley	600	1900	Standby	False	Active
900	Daisy	800	1700	Various	True	Active

Chapter 10

Purposes

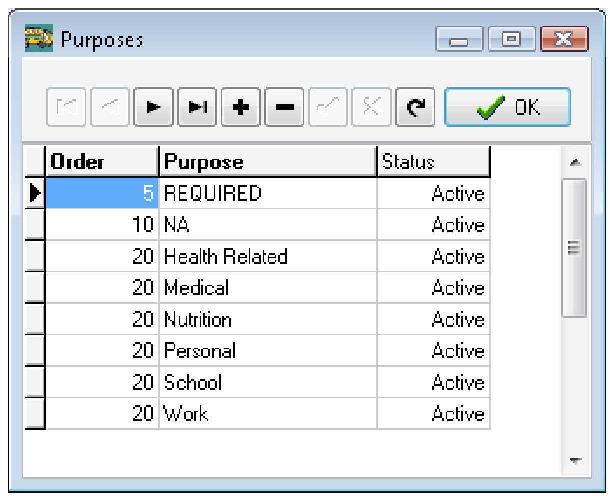
Administrators, funders and political bodies all want to know why your customers are riding the bus. How many are going to the Doctor's, shopping or to work. Your thoughts will vary on the degree of separation needed in this field. Should medical trips be grouped, or should they be separated into dialysis, pharmacy, hospital and Doctor? The choice is yours.

Entering Trip Purposes
Click on Admin, Programs & Fares then Purposes

This table gets our vote as one of the easiest to complete.

Listed are just some of the examples used by transit systems. Work would be another good example of a purpose.

Home is never listed as a purpose. Help your staff remember if someone is returning home from going to work, a medical appointment, or child care, their return trip purpose is the same as the beginning trip.



Chapter 11

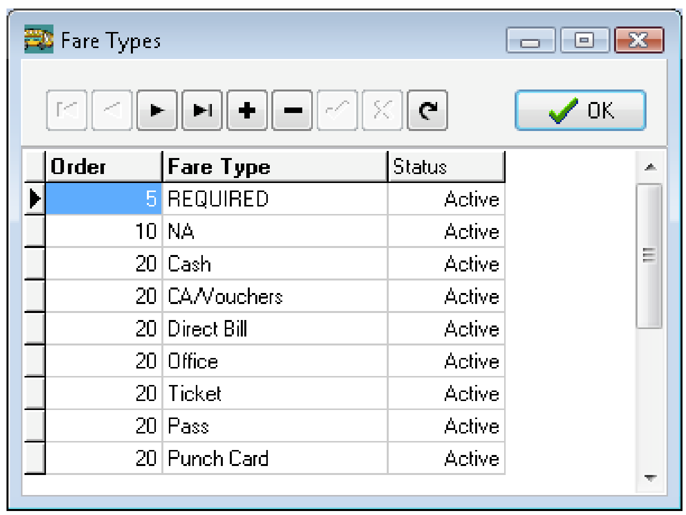
Fare Types

Entering Fare Types
Click on Admin, Programs & Fares then Fare Types

The Fare Types table provides the scheduler with a drop down box of payment choices for the passenger to pay for the trip. The fare type can be printed on the drivers manifest to inform the driver how much to collect from the customer.

Fare Type Options
When setting up fare types, agencies sometimes think of adding in a list of cash amounts.
Cash GP 8.00
Cash WH/CH 2.00
Cash Children 2.00

The staff at Mobilitat would suggest a simpler approach. There is a field to place the amount of cash to collect. One Cash type is generally sufficient. In the example at right the drivers would know whether to get cash from the rider, whether to look at a pass, or whether the driver needs to collect a ticket.



Chapter 12

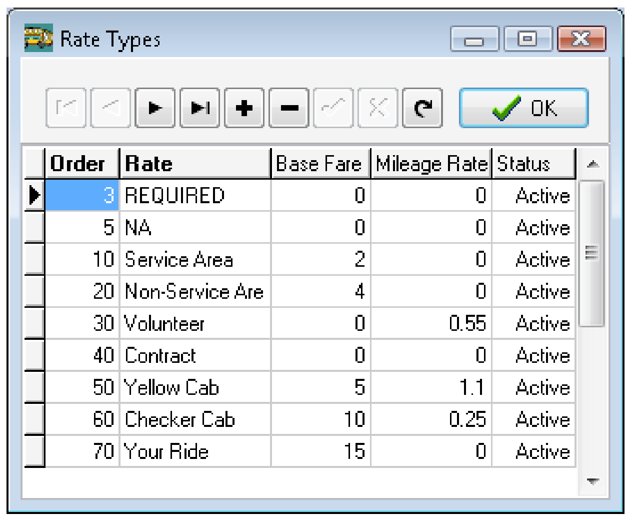
Rate Types

Click on Admin, Programs & Fares then Rate Types

Rate Types & Brokering

The Rate Types table provides the transit system the opportunity to broker trips. This section provides the transportation manager with a convenient way to detect which sub- contractor can provide a ride at the most cost effective price. Of course the rate type table does not do that by itself, but it sets up the necessary formulas for Easy Rides to calculate the cost of a brokerage trip.

When setting up rate types, list any provider with which you sub-contract rides. If you are not currently sub- contracting rides with any other business or organization you can complete this table as necessary. You may want to gather this information even if you are not currently brokering rides, because it could provide you valuable data to evaluate whether brokering a ride is a cost effective option. In this example, Yellow Cab charges $5.00 to get into the cab and $1.10 per mile after that.



Order	Rate	Base Fare	Mileage Rate	Status
3	REQUIRED	0	0	Active
5	NA	0	0	Active
10	Service Area	2	0	Active
20	Non-Service Are	4	0	Active
30	Volunteer	0	0.55	Active
40	Contract	0	0	Active
50	Yellow Cab	5	1.1	Active
60	Checker Cab	10	0.25	Active
70	Your Ride	15	0	Active

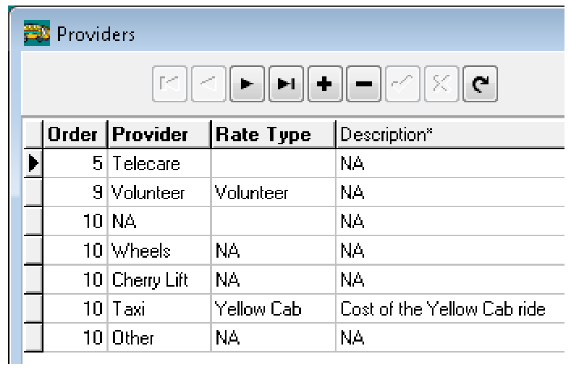
Please also reference the Provider table in Chapter 13 to make sure that you are assigning the data appropriately to each table.

Chapter 13

Providers

Click on Admin, Programs & Fares then Providers

The Providers table lists the organizations that will be providing rides to transit customers. Often times a transit system has only one provider….themselves. If that is the case you will have one listing in your table.



Providers

Order	Provider	Rate Type	Description*
5	Telecare		NA
9	Volunteer	Volunteer	NA
10	NA		NA
10	Wheels	NA	NA
10	Cherry Lift	NA	NA
10	Taxi	Yellow Cab	Cost of the Yellow Cab ride
10	Other	NA	NA

Brokering Transportation

As transit systems expand, brokering trips is sometimes an economical option to meet riders' needs without investing in additional equipment and staff. Systems that broker services may work with one or more providers. Schedulers frequently become "Mobility Managers" because they are scheduling trips across geography and across corporations.

A "Mobility Manager" will evaluate the cost effectiveness of the trip and book the trip with the most economical or appropriate provider. Use the Provider table to identify the different transportation providers which partner with your transportation system. This table enables the user to document not only the rate types that will be used, but the provider address, contact person and other vital information required to make a trip or process a bill.

Volunteer Providers

Volunteer Providers are also included in this table if they provide transportation documented by your system. Frequently volunteers are reimbursed on miles driven and they too need to be set up in both the provider table and rate table to assure that they can be properly reimbursed.

Chapter 14

Clients & Attributes

Click on Admin, Clients & Attributes then Age Groups

There are just a few more sections needing to be completed before we start entering client data. To provide for consistent reporting some client attributes have been pre-programmed into the software. These include Age Groups and Ethnic codes.

Age Groups

The types of age groups having been predetermined are:

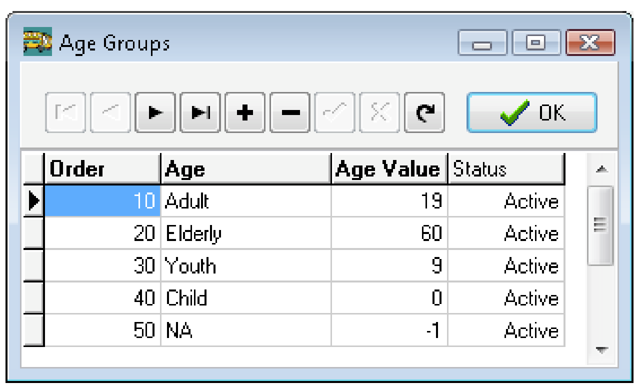
- Child
- Youth
- Adult
- Elderly

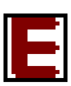
Changing Age Groups

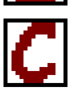
In Easy Rides, an adult is considered to be anyone from 19 to 60 years of age. It is possible to change these age ranges or add new topics. For example if you want to change the term Elderly to apply to anyone 65 or older:

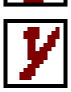
1. Click on the Age Value field on the row for “Elderly” to highlight the field
2. Change the age value from 60 to 65
3. Click the checkmark
4. Click the OK button

It is important to accurately collect the birthdates of riders to ensure the proper icon is displayed next to the riders name on the dispatch board identifying riders by age. Below are samples of the icons.




Elderly Ambulatory


Child Ambulatory

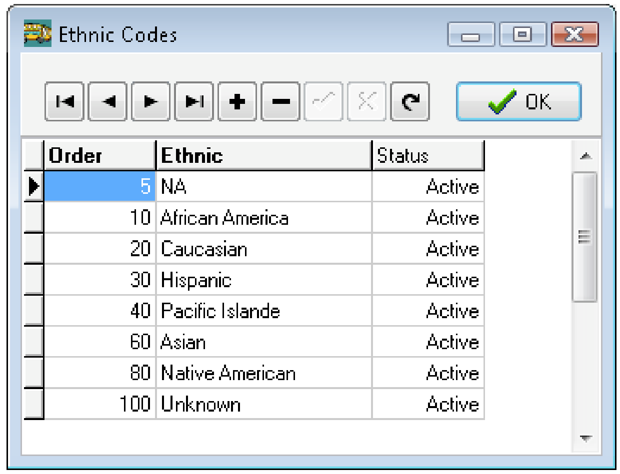

Youth Ambulatory

Ethnic Codes

Click on Admin, Clients & Attributes then Ethnic Codes

The types of ethnic codes having already been pre-programmed into the Easy Rides System include:

- African American
- Caucasian
- Hispanic
- Pacific Islander



Order	Ethnic	Status
5	NA	Active
10	African America	Active
20	Caucasian	Active
30	Hispanic	Active
40	Pacific Islande	Active
60	Asian	Active
80	Native American	Active
100	Unknown	Active

These are the types of headings that have appeared in most recent government reporting. It is possible to add additional ethnic codes (ex. Mixed race, Native Hawaiian etc.)

Adding Ethnic Codes

To add additional Ethnic codes:

1. Click on the "+" symbol
2. Assign an order to the new category
3. Type in the new category under "Ethnic"
4. Click the checkmark
5. Click the OK button.

Why Ethnic Codes Are Important

Documenting client race is important to show that your transportation system is serving the whole community. When inputting information about clients encourage staff to correctly gather and input this information the first time a rider is added to the Mobilitat transportation system. Once this data is correctly stored, any trips scheduled by that rider will include the ethnic code and enable transportation managers to produce reports showing the number of trips provided to community members by ethnicity.

Statuses

Click on Admin, Clients & Attributes then Statuses

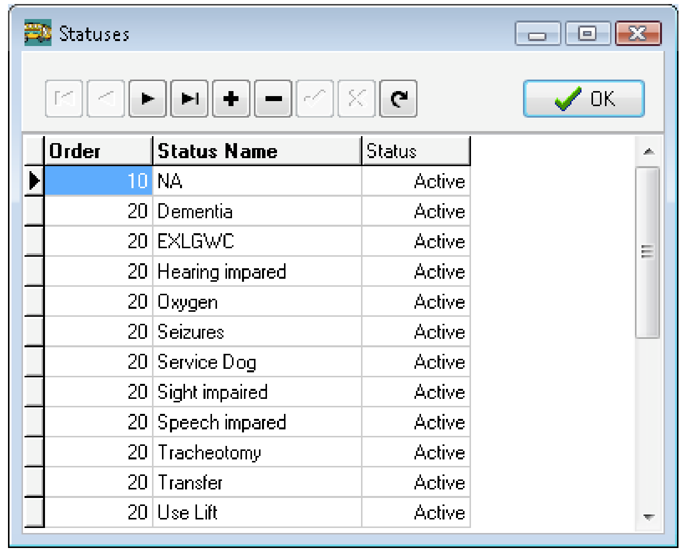
Statuses can be used to designate Client specific attributes such as:

- Uses Large Wheelchair
- Uses Leg Extensions
- Uses Oxygen
- Has Service Animal

This list can be customized for your needs.

To add Statuses:

1. Click on the "+" symbol
2. Assign an order to the new category
3. Type in the new category under "Status Code"
4. Click the checkmark
5. Then click OK.



Affiliations

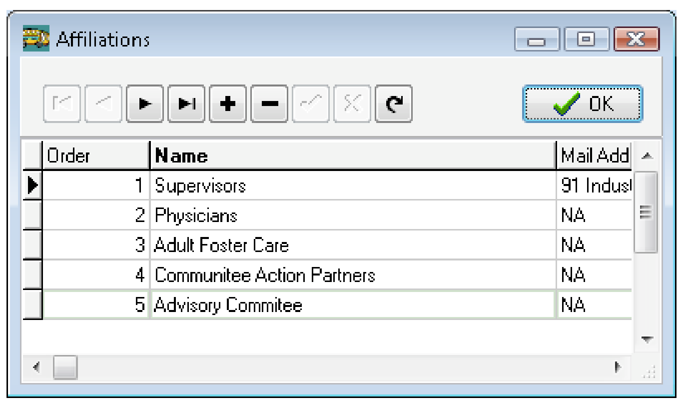
Click on Admin, Clients & Attributes then Affiliations

This item can be used in conjunction with Contacts & Contributors. Your system may have certain groups who ask for information on your statistics or you may need to list your contacts under a particular group for mailing purposes.

To add Affiliations:

1. Click on the + symbol.
2. Assign an order number.
3. Enter a name in the name field.
4. Enter an address if applicable.

   Note* In order to use the list for labels, it is best to separate city, state and zip into their respective columns.
5. Click the checkmark
6. Click "OK".

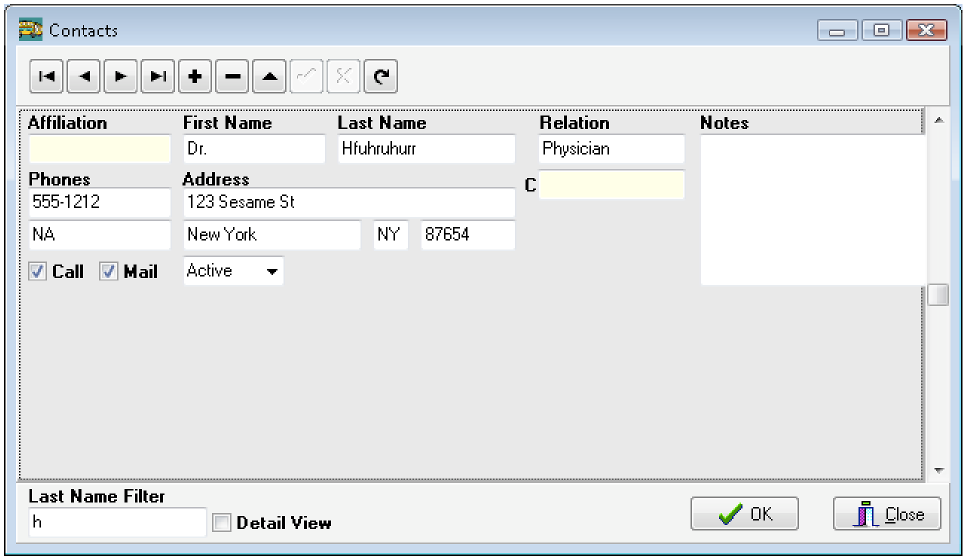


Contacts and Contributors

Click on Admin, Clients & Attributes then Contacts & Contributors

Easy Rides has included a place for your system to keep track of your contacts and contributors. This will allow you to create mailing lists and labels. Some systems have community partners contributing funds or equipment to the system. Maybe you have customers who live in group homes or foster care. These lists can be used for mailing thank you notes, or service alerts, etc.

The form can be used several ways. As a general contact, you would enter just the contact information. If this contact is associated with an affiliation, you would click inside the Affiliation box and a list of the affiliations will be available for you to choose from. By clicking on the "C" box, the client list will become available and you can associate this contact with a particular client.



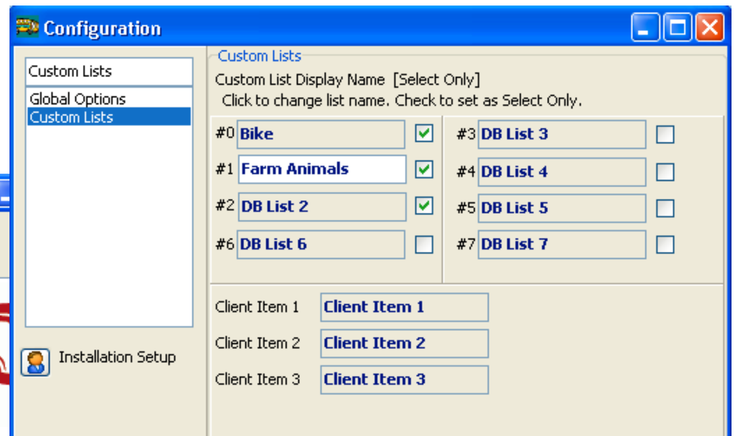
Chapter 15

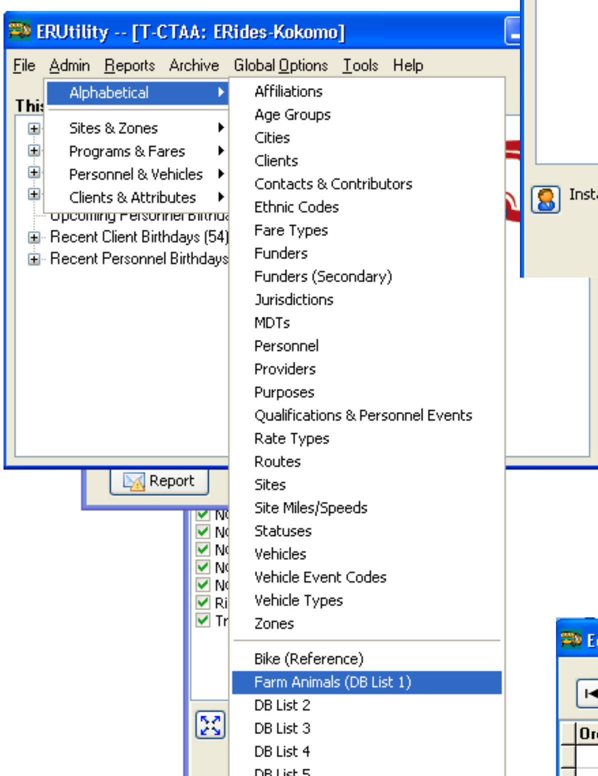
DB List and Other Options

Mobilitat provides several additional fields that can be tailored to a particular transportation provider's unique needs. The fields are created by selecting

Global Options, Configuration then Custom Lists

From here, we checkmark the desired field, label as desired and click OK.

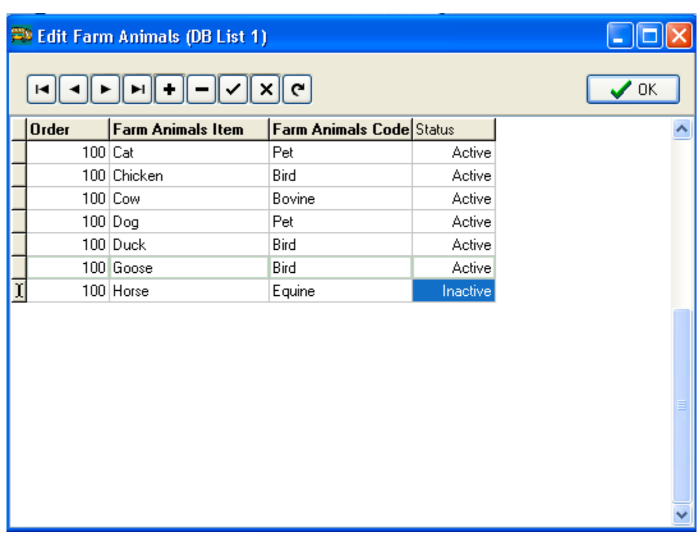




Next, we enter the choices for the fields we created. To do this, we select

Admin, Clients & Attributes

We see the fields we created. We select one which opens the Edit items window and proceed to add the choices.



Similar topics needed to be grouped together under the same DB List. Examples other systems have used these fields for include:

- Income Status of customer
    - Above poverty
    - Below poverty
- Heavy Lift Required
    - Yes
    - No

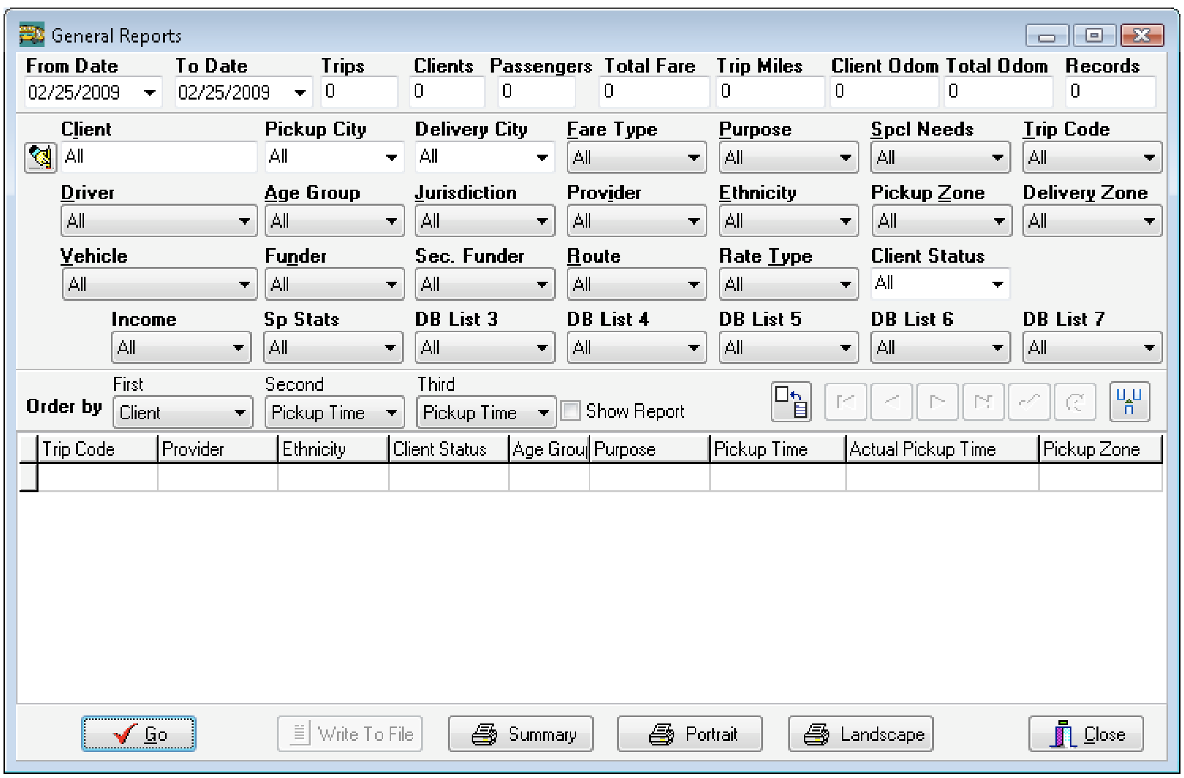
Chapter 16

Reports

Monthly Rides Report

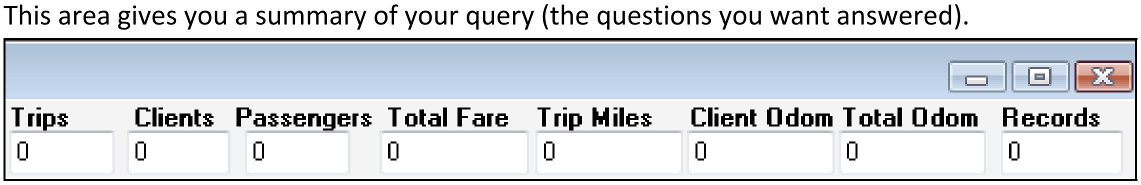
Although the Easy Rides Monthly Report Screen may seem daunting when you first look at it, it provides a comprehensive and straightforward way to obtain management and administrative information about the rides you deliver. This report uses information contained in the Trip Archive table. An on-line training video of this of this report is available at: http://www.mobilitatsoftware.com/support/training-videos/general-reports (User name and password required to access)

When you first open the report you will see the following screen:

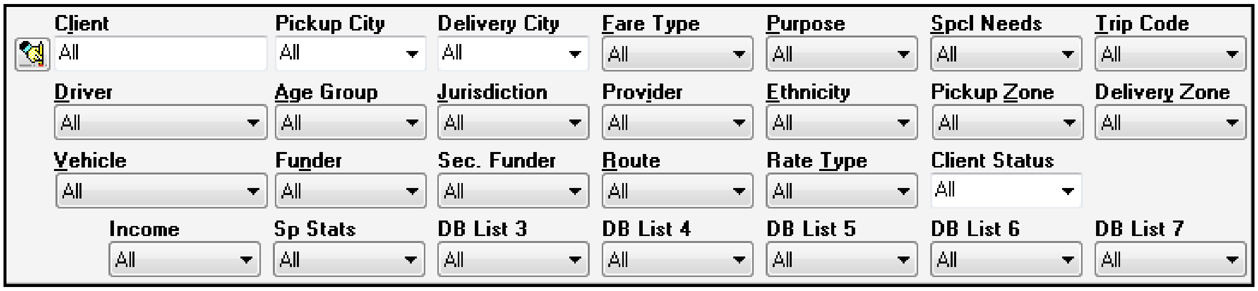


The screen has four different areas.

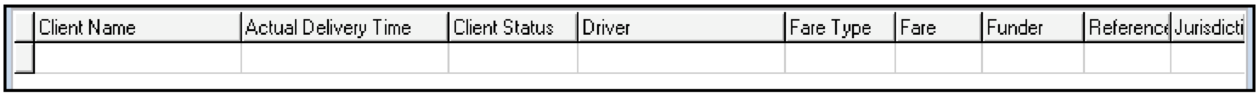
This area gives you a summary of your query (the questions you want answered).



This screen contains the query details.



This part of the screen contains the information you want to see (the results of your query).

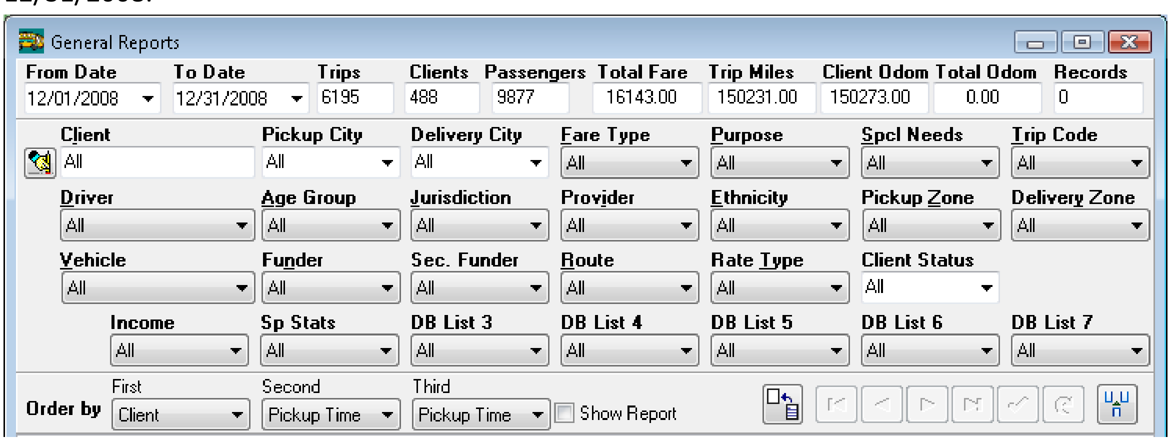


The buttons at the bottom of the screen govern your output choices:

DEFINING YOUR QUERY

To begin displaying information, all you need to do is select the information you want from the drop down boxes and then press the Go button.

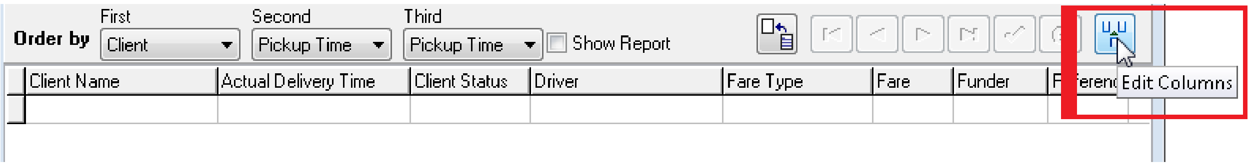
For example, the following screen contains summary information about the time period 12/01/2008 to 12/31/2008.



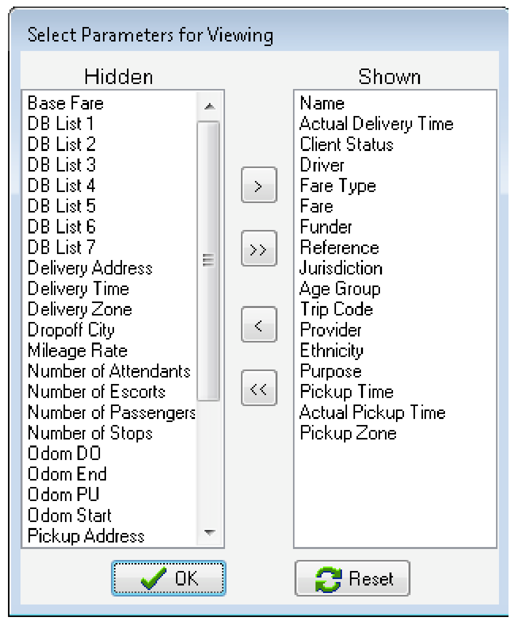
To see the detailed information, check the "Show Report" box then click the OK button again. This will display all the individual information summarized at the top of the screen.

CHOOSING OUTPUT INFORMATION

To customize the columns displaying the information you want to see, click the Edit Columns button.



This will display the "Select Parameters for Viewing" window:



To include more information in your results, we highlight desired parameters from the "Hidden" column and press the right arrow key to move it into the "Shown" column. To hide information, we highlight parameters from the "Shown" column and press the left arrow. To move all the parameters right or left, we click the corresponding double arrows. To change the order of the items in the "Shown" column, we click and drag the parameters up or down as desired. When we have customized the information to our satisfaction, we press the "OK" button to confirm the changes. This closes the window. Pressing the "Go" button again displays the new information.

CHOOSING REPORT OUTPUT OPTIONS

When you have a report you'd like to print, you have several options.

To print the information you have displayed, choose whether you want the report printed in Portrait (vertical) or Landscape (sideways).

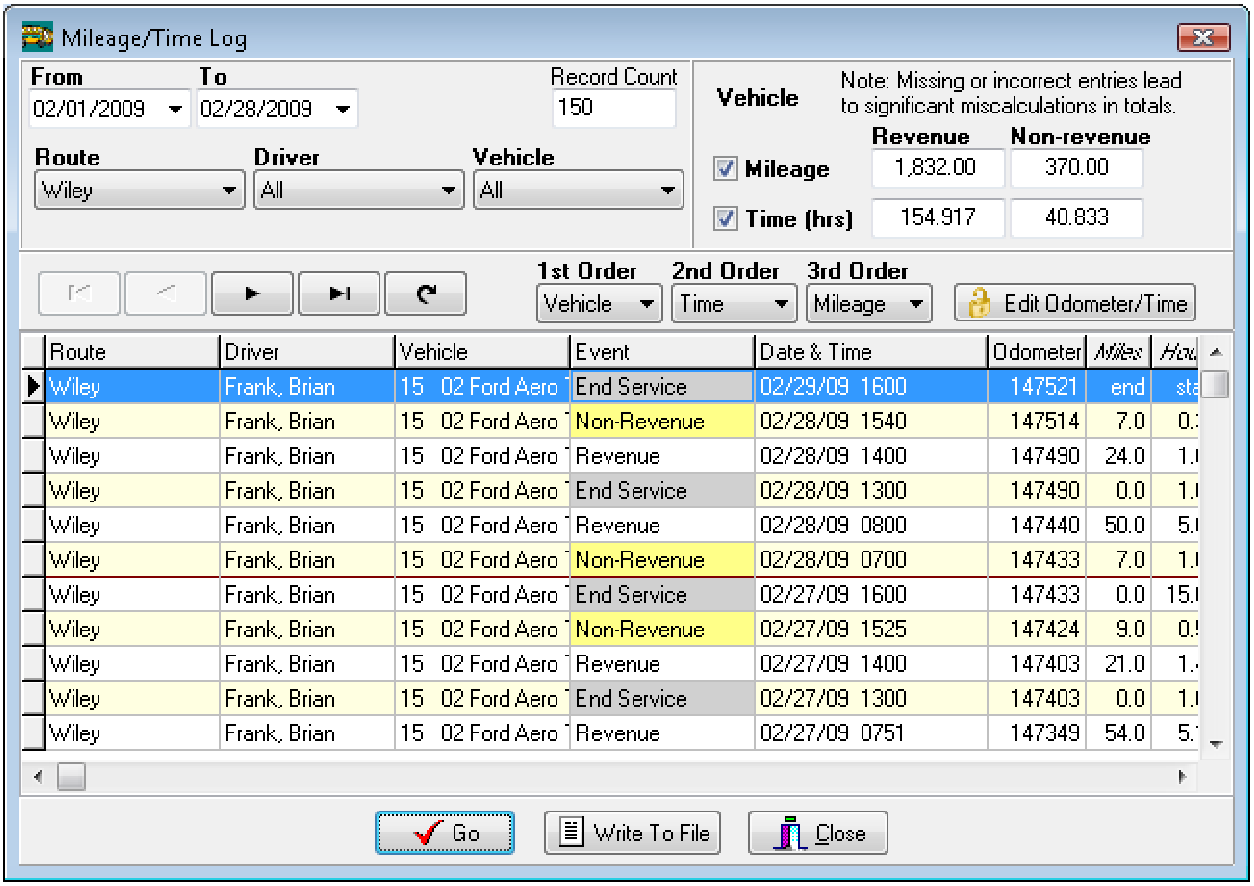
To print only the Query and its results, choose "Summary".

If you want to save your data in another format, choose "Write to File". This option will give you the choice of saving your report to an Excel file or saving it as text.

Mileage/Time

The Mileage/Time report shows Revenue Hours and Mileage, and Non-Revenue Hours and Mileage. You are able to edit the log to correct any discrepancies. An on-line training video of this of this report is available at: http://www.mobilitatsoftware.com/support/training-videos/mileage-and-time/

Click Reports then Mileage/Time

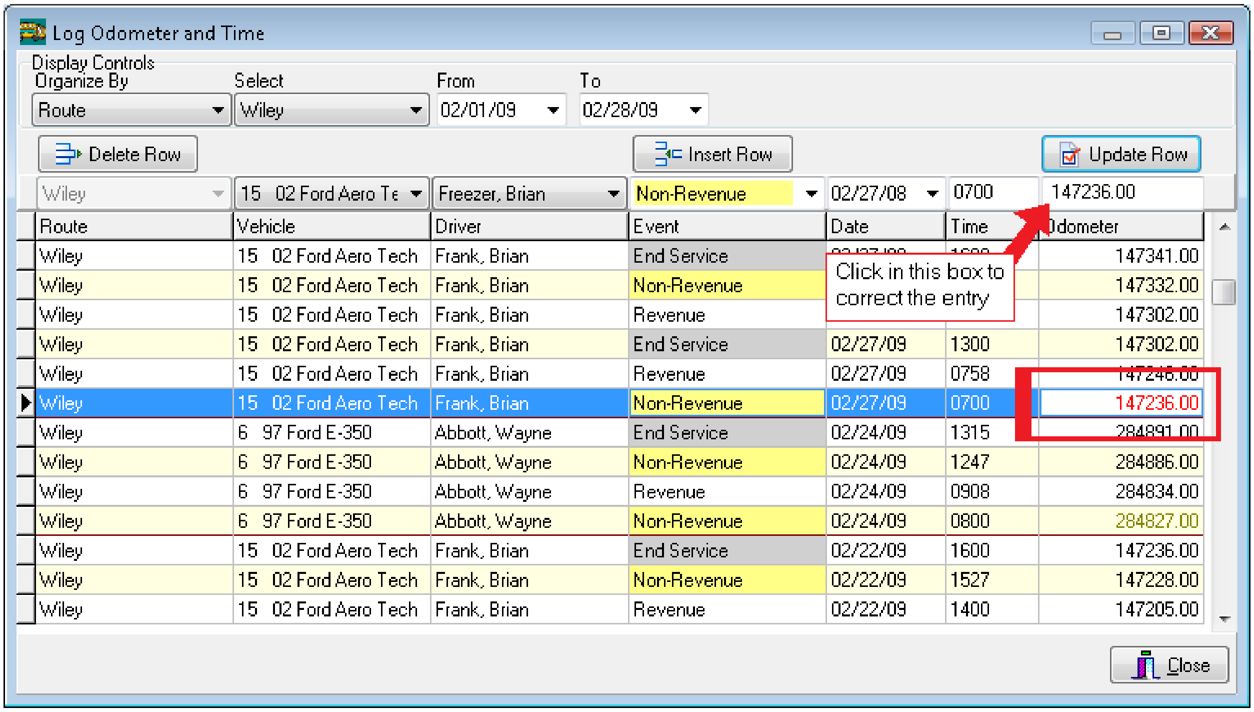


The information shown is for the Wiley route from February 1- February 28. The route traveled 1,832 miles and spent 155 hours in Revenue service (this system also tracks non-revenue miles or hours but some systems don't). Using the drop-down boxes will allow you to choose the information you want to see, and the way it will be displayed.

The dark red line divides the entries by day. The tan colored entries indicate a period of time (between the first and last entries for the day) that exceeds either 8 hours in service, or more than 200 miles traveled for the day. Mileage discrepancies will show the incorrect entry in light red.

To edit entries: highlight the row you wish to change. Click on "Edit Odometer/Time"

See next page.



In this entry, we can see that the wrong mileage was entered for 2/27/09 for the beginning Non-Revenue entry. Click once in the Odometer box to correct the mileage then click "Update Row".

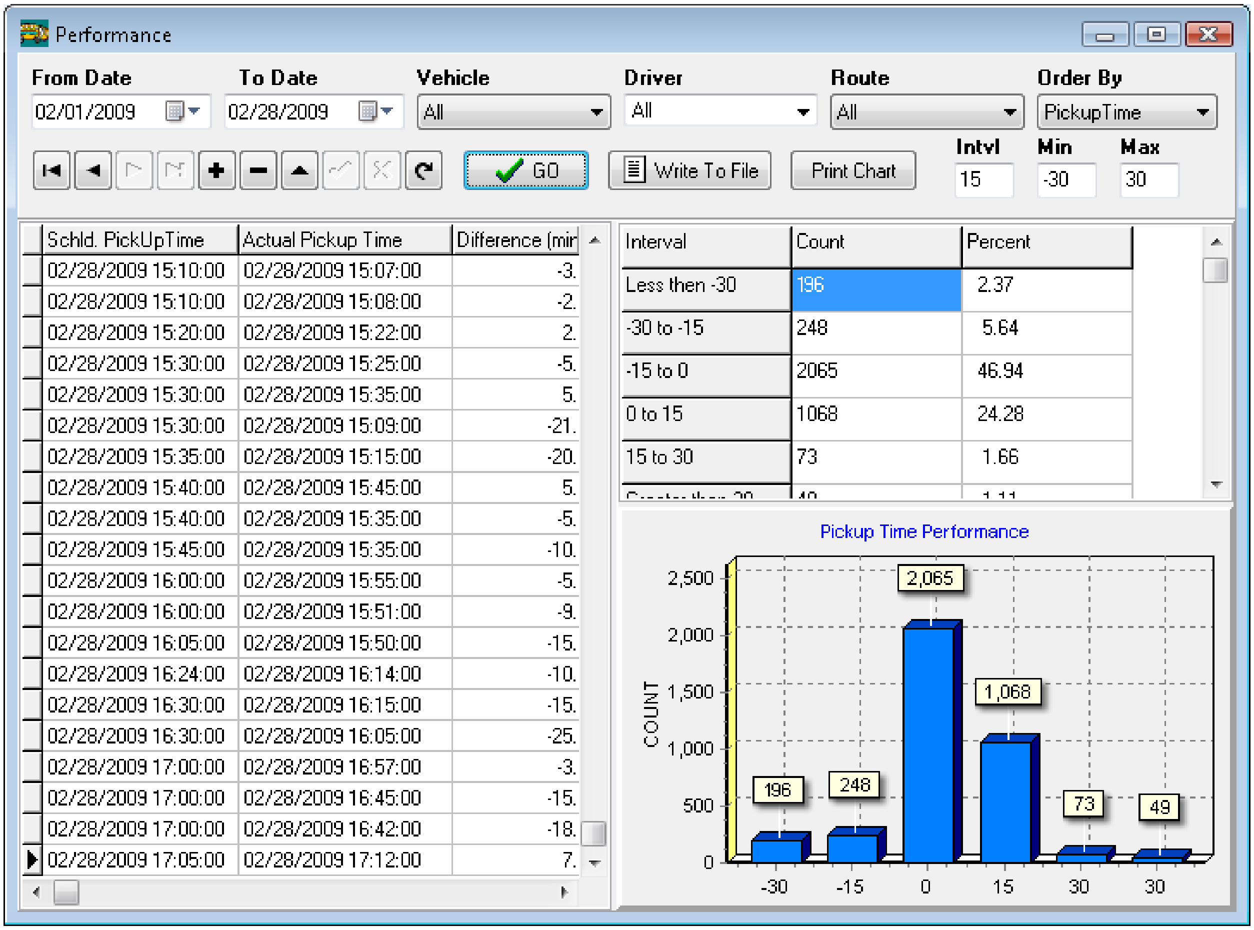
To add or delete rows, use the "Delete Row" or "Insert Row" buttons.

This report needs to be carefully reviewed for accuracy. Discrepancies in mileage and time will affect the On Time Performance Report, and we will have incorrect information when reporting Service Hours and Mileage to funding partners.

Pick Up Performance

The Pick-Up Performance report shows on-time performance in several different ways. We can see how the system as a whole is performing or sort by individual vehicle, driver or route. An on-line training video of this of this report is available at: http://www.mobilitatsoftware.com/support/training-videos/pickup-performance

Click Reports then PickUp Performance.



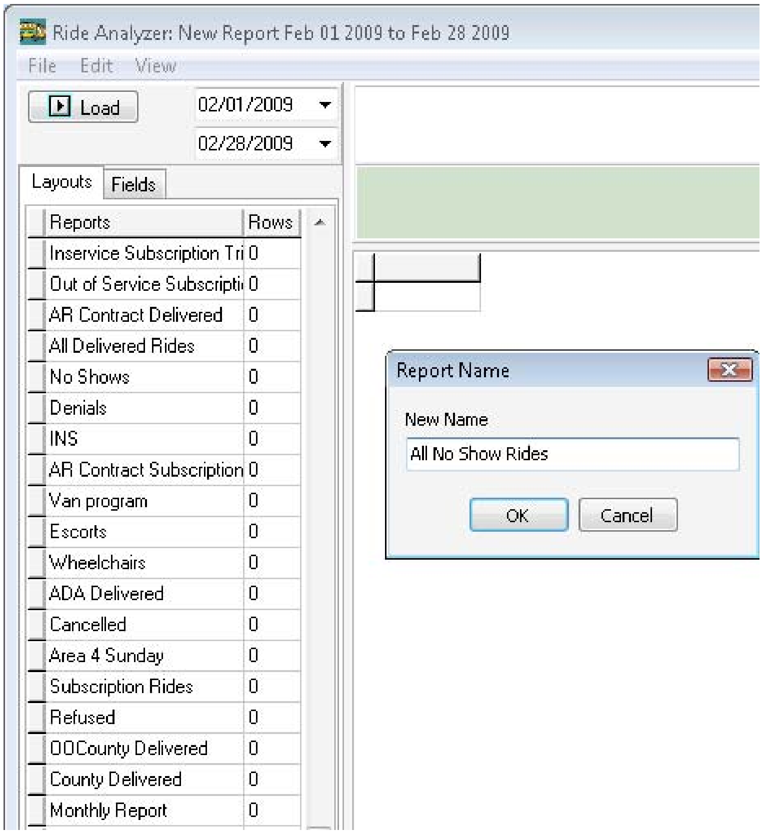
This report shows a 1.5-hour pick-up window. The industry standard for on-time performance is to include all rides 15 minutes before a scheduled pick-up and 15 minutes after. Those three columns, added together, indicate 3,381 rides were picked up on-time. The chart is printable and can be used to show staff how well the system is doing or where some efficiencies need to be gained.

Rides Analyzer

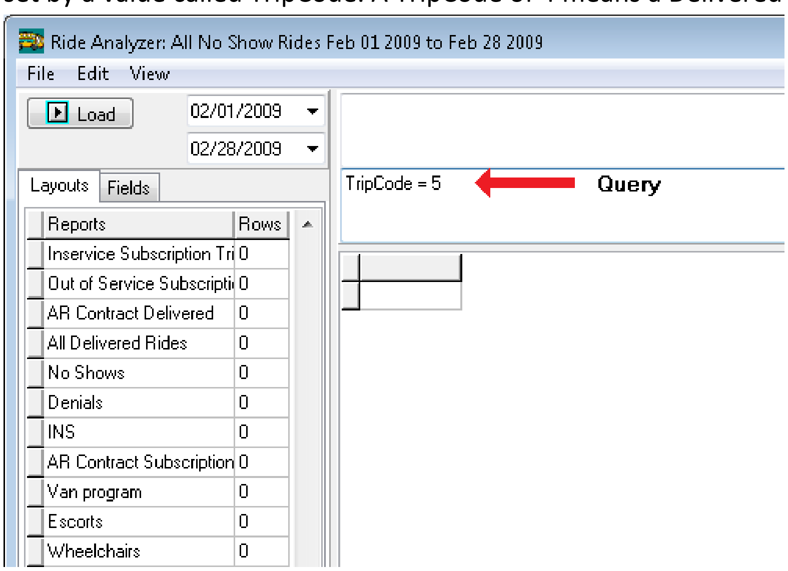
The Rides Analyzer is our advanced reporting tool. It can perform the same tasks as the Rides(Monthly) report, but it can save multiple queries so we don't have to manually set the query each time we use it. It can be used for getting common count information such as how many No-Show trips were taken in a given time period. It can also be used to get a data set to further process in Excel and it can be used to track which rides have been billed and paid.

Click Reports then Rides Analyzer

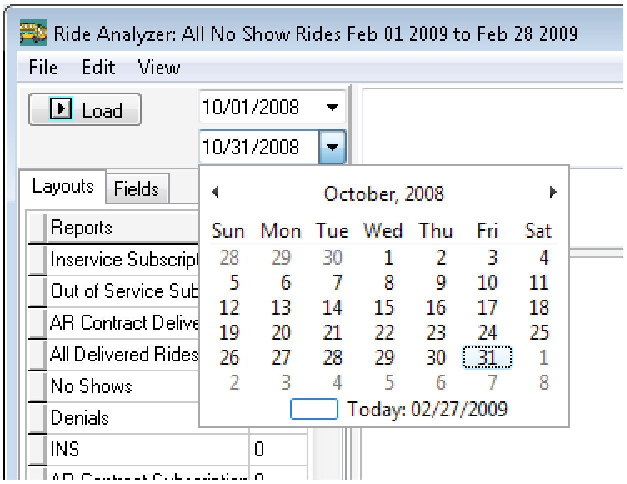
Select File then New to create a new report and give it a name.



Enter a query in the query field. In this case we want to know all of the No Show trips. A trip's status is set by a value called TripCode. A TripCode of 4 means a Delivered trip, 5 means No Show.

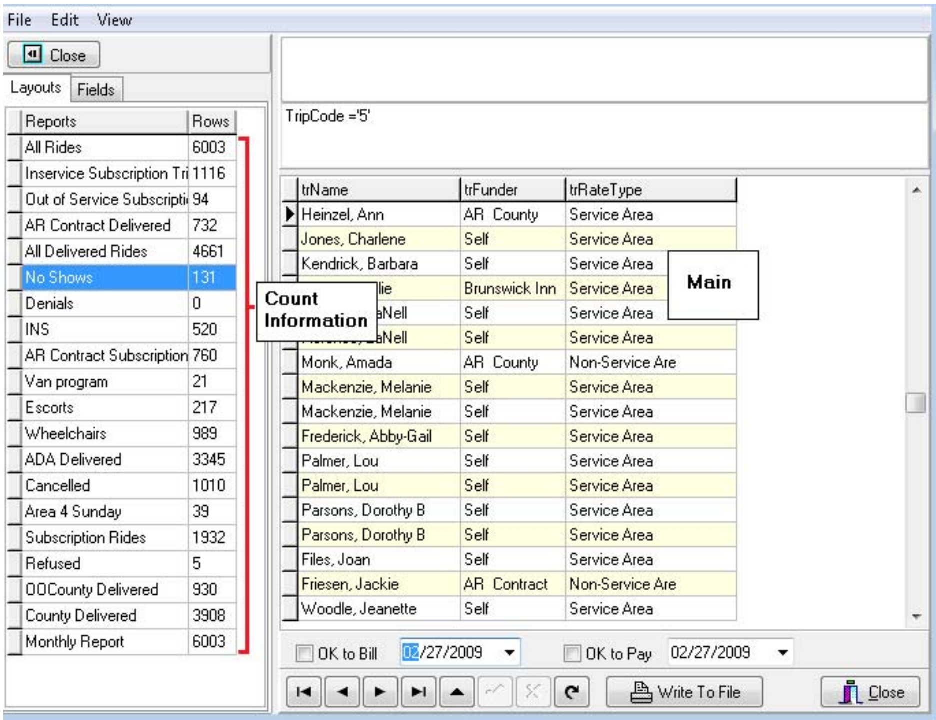


Now that we have created the query, we want to load it for a specific date range.



After selecting the start and end date, click the load button and Rides Analyzer will load the data for our new query along with any other queries we have previously created.

Once the data has loaded, the number of results for each query will be displayed in the Layouts tab.



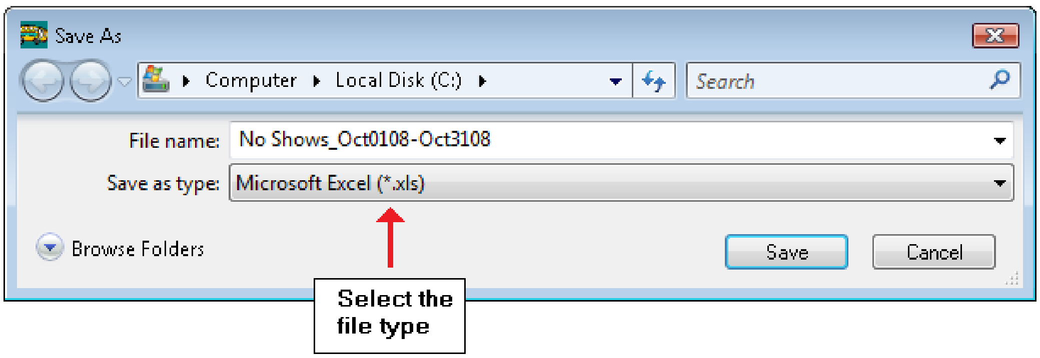
The Fields tab contains a list of fields are available to use in queries. Checking the box next to a field adds it to the data shown in the main results area.

Double clicking a row in the main results window opens the Trip Ticket corresponding to that record. From there we can edit any of the data for that trip.

At the bottom of the main window there is a tool we can use to mark two fields for all of the records in the current query. Ok to Bill and Ok to Pay can be assigned a date. If you check these boxes it will assign the date selected to the current record. This can be used to mark what tickets have been invoiced and/or paid.

To save the output of a report, click the Write to File button. This displays a “Save As” dialog box allowing us to specify where to save the file along with the file type.

The preferred type is Microsoft Excel. This allows us to open the file in Excel and format the data as needed.



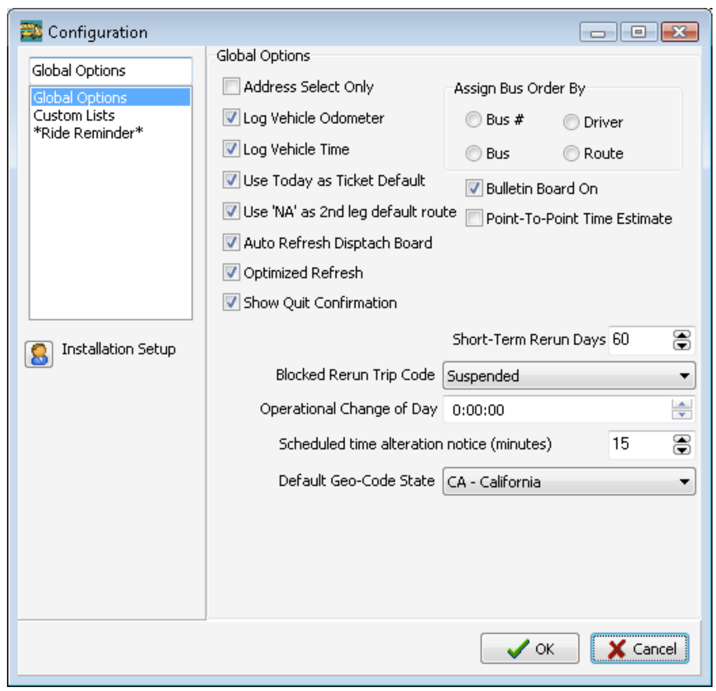
Chapter 17

Global Options

Global Options allow you to set defaults on some items and to customize others. As with all database items, we recommend you set the item defaults before beginning to use the program in real-time.

Configuration

Click Global Options then Configuration



There are three sections within Configuration.

<u>Global Options</u>

<u>Address Select Only</u>

When a system chooses to install the GIS/Auto Scheduling feature in Easy Rides Plus, addresses in the Client database need to be entered in a particular format. This allows the geo-coding function to not only find the address, but associate it with a latitude and longitude and store it for future use. Choosing this option will force the scheduler to enter the address the correct way. This also prohibits arbitrary addresses such as "Walmart" with no physical address. Physical addresses are important; everyone in town knows Walmart is out on Route 13, but the computer does not. It has to have a latitude and longitude associated with it in order to allow the Auto Scheduler to place trips in a logical order on the routes. Place names are allowed (such as Walmart), but they need to be entered the correct way.

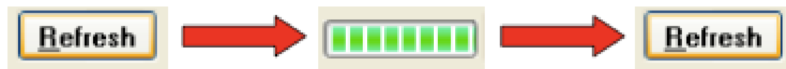
<u>Log Vehicle Odometer/Time</u>

These sections work together to allow your system to track revenue and non-revenue time and mileage. If your system dispatches in real-time, your drivers are calling you each time they pick up and drop off passengers. Easy Rides provides a place for you to do this manually. (If you have Mobile Data Computers in your vehicles this operation will occur automatically). To enable these actions, click on Log Vehicle Odometer. Return to the list by clicking Global Options, then Log Vehicle Time. These actions place a check mark next to each option to indicate they are enabled. For instructions on using these features, please see the Easy Rides manual.

Use Today as Ticket Default
When you first open a trip ticket, the date field flashes red and is set to a particular date. You can choose to have this date always default to today. A check mark will indicate the feature is "on".

Use 'NA' as 2nd leg default route
Users have the option of Using 'NA' as the second leg default route. Selecting this allows us to choose the second leg route rather than have it automatically assigned to the same route as the first leg.

Auto Refresh Dispatch Board
This option causes the Dispatch board to automatically refresh once a minute instead of having to manually trigger the refresh.



Optimized Refresh
This option speeds up the refresh process by refreshing only the trip tickets that have been touched in the last hour (best for systems with one or two computers).

Show Quit Confirmation
Eliminates the confirmation message, "Are you sure you want to close Easy Rides?" when exiting the Easy Rides application.

Assign Bus Order By
When a scheduler or dispatcher needs to assign or reassign a vehicle, they have the option to have the list displayed by Bus#, Bus Name, Route Name or Driver Name, all in alphabetical or numerical order.

Bulletin Board On
If your dispatchers/schedulers will be using the bulletin board feature to communicate, you will need to enable this option. To enable, simply click on the feature in this list. A check mark will indicate the feature is "on". For instructions on using this feature, please see the Easy Rides manual.

Point-To-Point Time Estimate
This option allows users to view an estimate of the time from one point to another.

Short-Term Rerun Days
By choosing this option, the transit system can set a default period of days for Short Term Reruns. This feature is explained in detail in the Easy Rides Manual.

Blocked Rerun Trip Code
This option allows users to select how suppressed, expired and locked-out reruns are to be tracked.

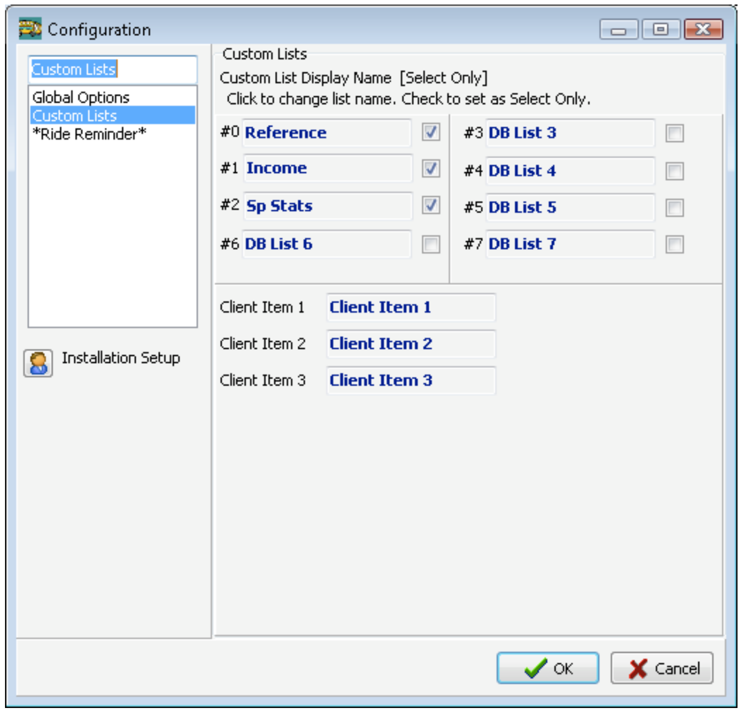
Operational Change of Day
Designed for transit systems that provide rides outside of regular business hours, this option allows users to choose when their day changes.

Scheduled time alteration notice (minutes)
If trips are rescheduled outside of the time limit designated (defaults to 15 minutes), effected riders are listed so they can be notified of the change.

Default Geo-code State
Select the default state for geo-coding

Installation Setup
This feature is used by Mobilitat to set the different versions of Easy Rides as per the contract

Custom Lists



When a system chooses to use the Custom Database Lists, the option is given to either create a drop-down list that schedulers or dispatchers use for selections determined by the administrator, or the system may choose to allow schedulers and dispatchers to fill in information on these lists as they choose. For example, a list may contain special codes for a particular funder. Pre-determined codes can be entered as a drop-down and staff may only choose codes on the list. To ensure they only choose these codes (and do not enter other codes) you would set the option here to Select Only for the List that is confined (DBList1, 2 etc). To allow staff to enter information without constraints, simply “uncheck” the item.

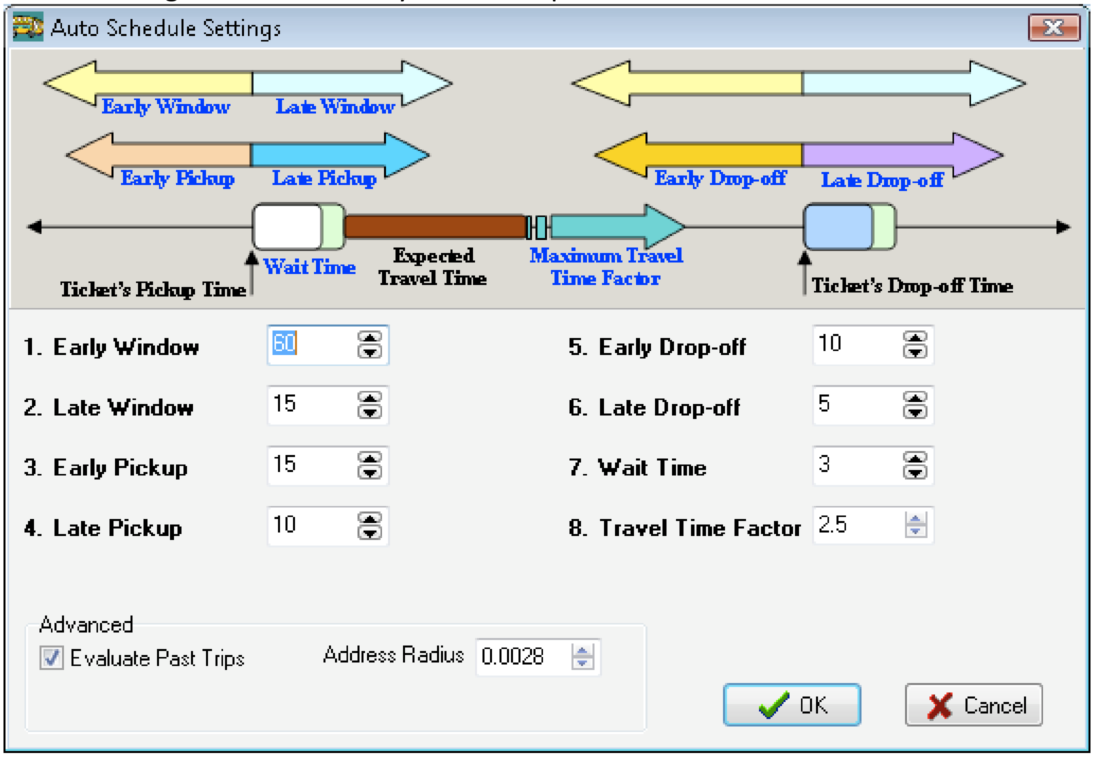
Ride Reminder

This feature allows users to select and automatically contact clients reminding them of their upcoming trip. A customized, pre-recorded message is played, with the date and time of their first scheduled pick-up inserted into the message. A web interface displays the outcome of each call. Contact Mobilitat for details.

Auto Scheduler

Click Global Options then Auto Scheduler

The following screen is where you will set parameters for the Auto Scheduler functions.



The fields above will be set to time increments for use by the Auto Scheduler. When the Auto Scheduler is used to route your drivers for pick-ups, it uses this information to determine pick-up windows for the tickets and places them in the most efficient order.

If your system uses a 15 minute pick-up window, you can tell the Auto Scheduler to schedule your trips with an allowance of 15 minutes on either side of the requested pick-up time. The Early Pick-Up would be set to 15. The Late Pick-Up will be set to 15. This will ensure trips are scheduled so these windows are not compromised.

The Travel Time Factor can be set to allow the Auto Scheduler to use the information (posted speeds, construction data, etc) given by the MapPoint Software when determining travel times. Alternately, if your drivers encounter a lot of slow moving vehicles, train traffic, etc, you may want to increase the travel time to allow for this.

GIS

Global Options then GIS

<u>Predict Stop Times Point-to-Point</u>
This controls how Easy Rides finds the estimate for travel time when you press the spacebar on the Trip Form time fields. Systems can estimate stop times using the pre-calculated distance between sites which we call Site-to-Site (this is the default method). The other method, Point-to-Point is also available to systems with GIS. Using the Point-to-Point method is more accurate, but does take a few seconds.
To calculate Point-to-Point, schedulers normally hold the ctrl key when they press the spacebar. Mappoint is then used to calculate a route between the pick-up and drop-off to determine the time estimate. With this option enabled, schedulers don't have to hold the ctrl key. Easy Rides will always calculate the estimates using Mappoint routing.
<u>Calculate Mileage/Time</u>
This option controls the Archive feature for calculating Odometer or Time values based on GIS routing.

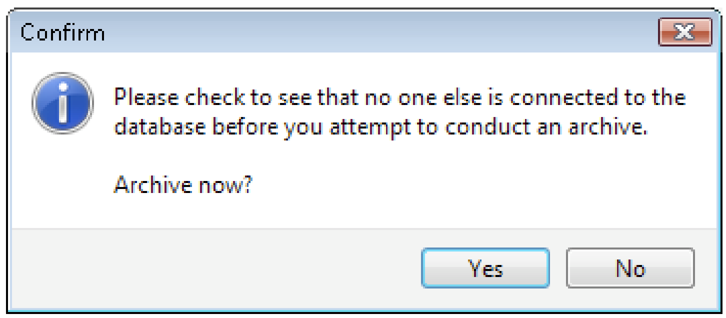
Chapter 18

Archive

Archiving is the mechanism that moves your daily operational data into the database where all your reporting functions occur. On a daily, weekly, or monthly basis, depending on the transit systems needs, you will perform the Archive operation.

Click Archive then Move trips to the Archive

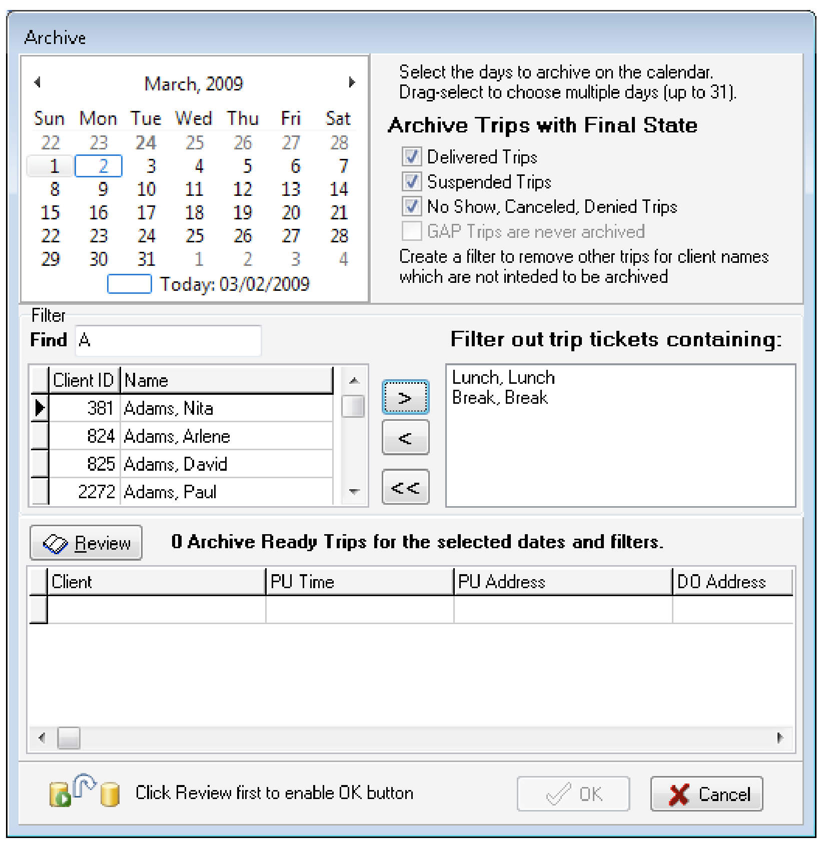
Clicking on "Move trips to the Archive" will display the screen to the right. You want to make sure no one is working is Easy Rides for the few minutes it will take to Archive. This will ensure all data is collected for the reporting process. Click yes when you are ready. The screen on the next page will be displayed.



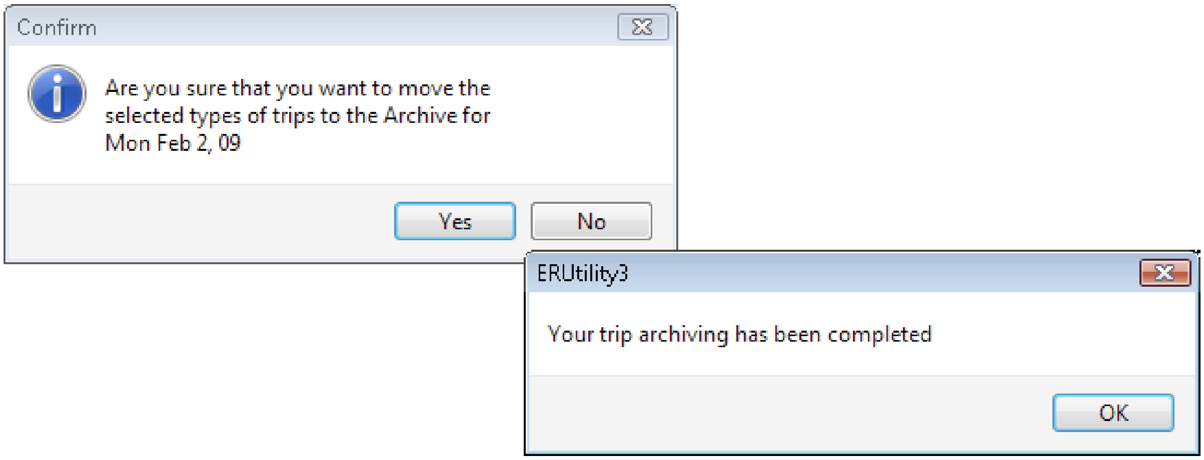
Choose the range of days to be archived. If your system reports on Suspended, No Show, Canceled, and Denied trips, make sure these as well as the Delivered Trips check boxes are marked.

If you created "lunch break", or "break tickets", or other tickets that are not actual client trip tickets, you will want to filter these out before you archive. This will eliminate them from being counted in the total trips delivered, canceled, etc.

Click the Review button to display the trips being archived and enable the OK button.

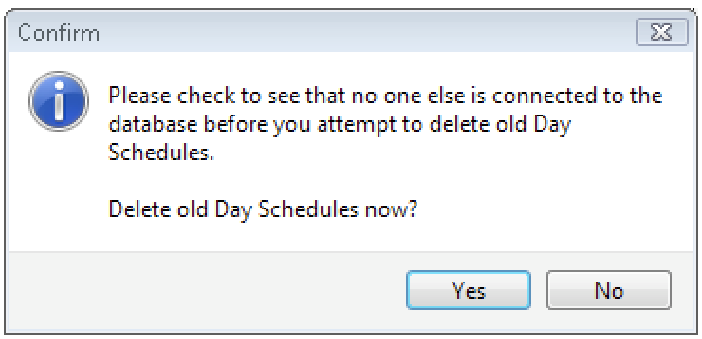


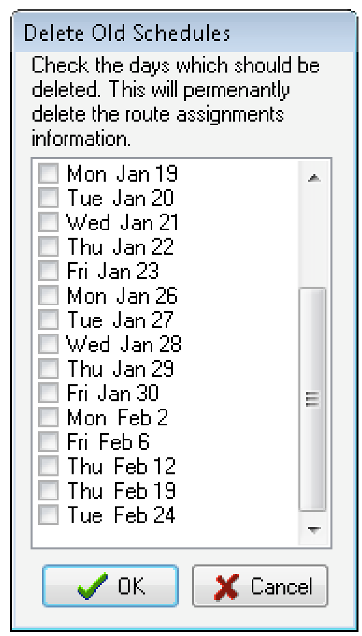
Confirm the date. When you click yes, a progress bar will show the archiving is being completed. When it is finished the screen below to the right will pop-up.



Delete Old Day Schedules
Click Archive then Delete Old Day Schedules

When you complete the Archive process, you no longer need to keep your old day schedules. All information has been removed to the archive so you are now able to delete the old day schedules. Make sure no one is connected to the database.





We click Yes then click on each box to the left of the day schedules we wish to delete. The display to the right contains sample info, not a real database. Your list will show days you currently have open. Make sure you only delete past days that have been archived.

Delete Old Bulletin Board Messages
Click Archive then Delete Old Bulletin Board Messages
If your system chooses to use the Bulletin Board feature, this is where you delete messages you no longer need.

Calculate Odometer/Time with GIS
This feature updates two fields in the trip archive used in the GIS odometer/time Verification report. It must be run before the report tool will be able to analyze actual vs. expected mileage.

Chapter 19

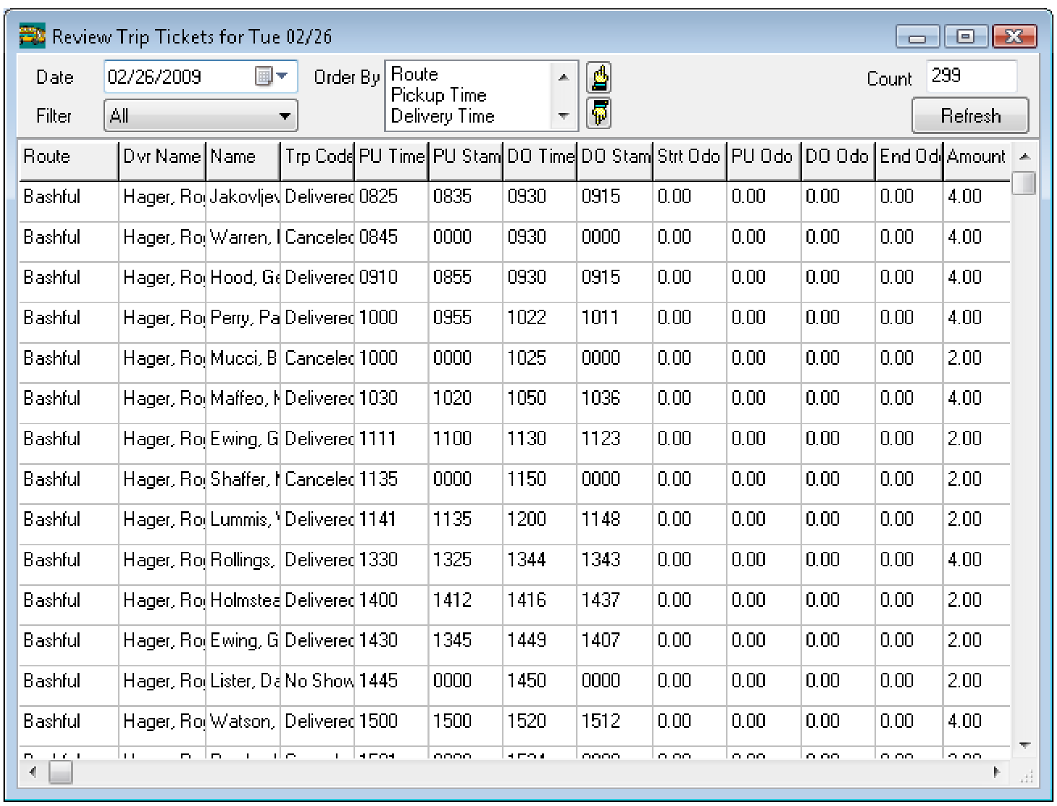
Tools

This section is a collection of Tools where you can perform certain actions on your data.

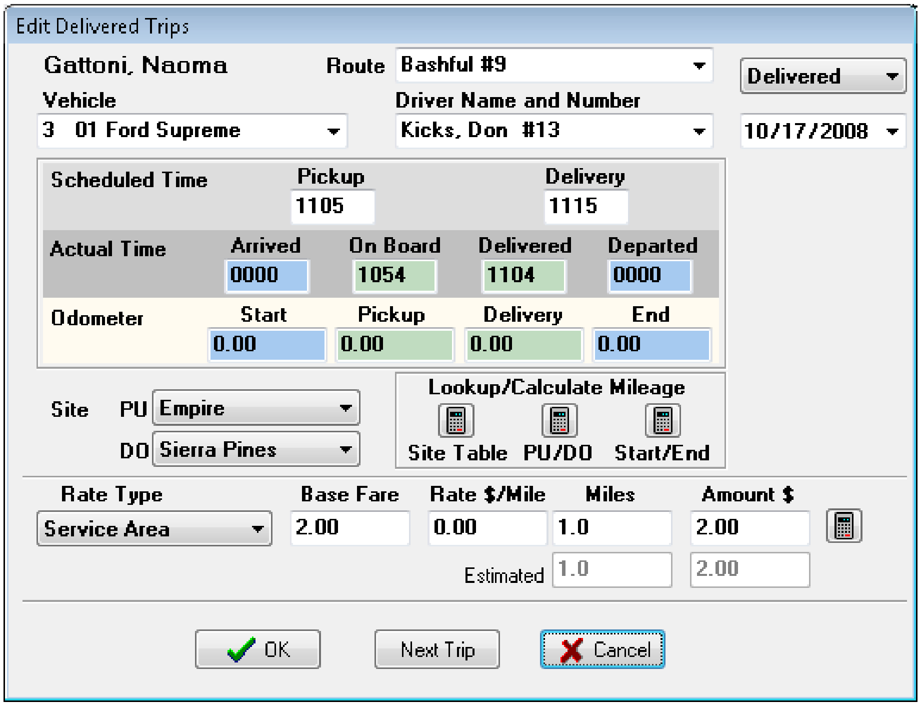
Edit Delivered Trips
Click Tools then Edit Delivered Trips

Once you have archived your daily trips, you still have the ability to change information on the trip tickets.

The screen below shows all trips for 2/26/2009 that were archived. The default setting lists the trips by route, by pick-up time. You can change the display with the “Order by” drop-down list. Double clicking on a line of trip information will display the information on the screen on the next page. You can edit rate type, driver, vehicle, trip code (delivered, canceled, etc), and the time and date of the trip. You can also edit mileages here. This can be helpful to ensure you are recording the correct mileage for funders that require you to report mileage on their clients' trips.



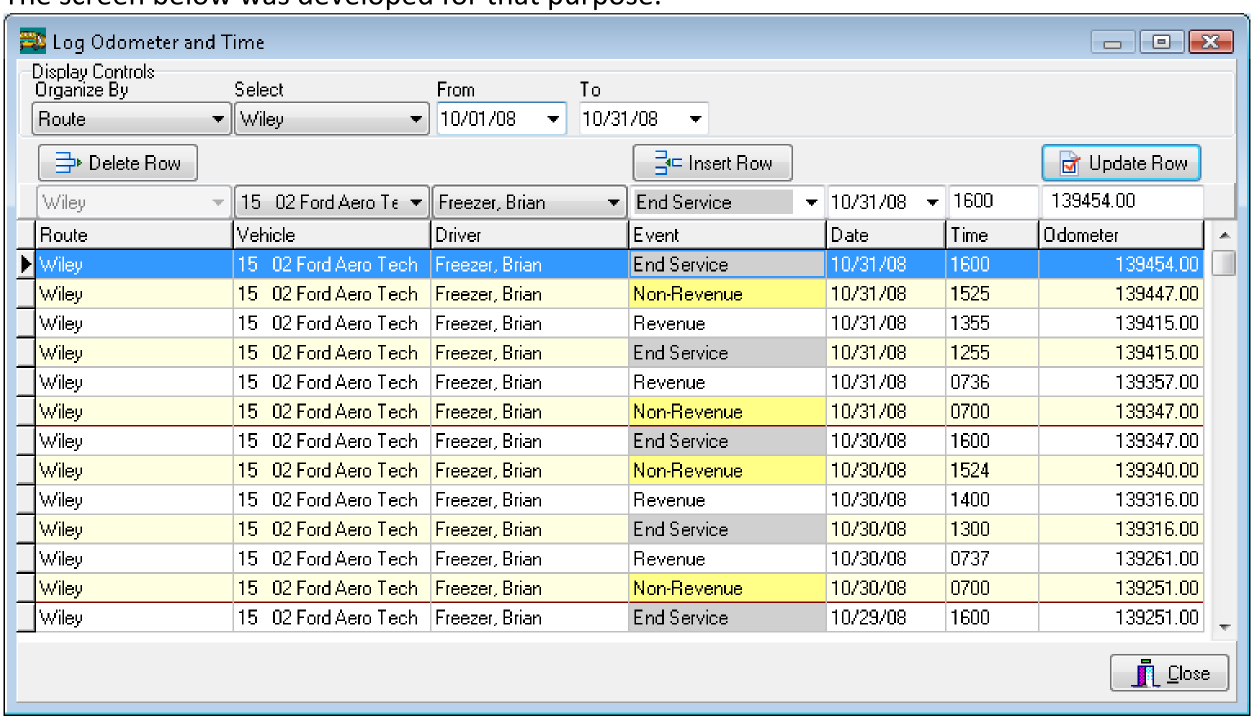
Route	Dvr Name	Name	Trp Code	PU Time	PU Stam	DO Time	DO Stam	Strt Odo	PU Odo	DO Odo	End Od	Amount
Bashful	Hager, Ro	Jakovljev	Delivered	0825	0835	0930	0915	0.00	0.00	0.00	0.00	4.00
Bashful	Hager, Ro	Warren, I	Canceled	0845	0000	0930	0000	0.00	0.00	0.00	0.00	4.00
Bashful	Hager, Ro	Hood, Ge	Delivered	0910	0855	0930	0915	0.00	0.00	0.00	0.00	4.00
Bashful	Hager, Ro	Perry, Pa	Delivered	1000	0955	1022	1011	0.00	0.00	0.00	0.00	4.00
Bashful	Hager, Ro	Mucci, B	Canceled	1000	0000	1025	0000	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Maffeo, M	Delivered	1030	1020	1050	1036	0.00	0.00	0.00	0.00	4.00
Bashful	Hager, Ro	Ewing, G	Delivered	1111	1100	1130	1123	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Shaffer, I	Canceled	1135	0000	1150	0000	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Lummis, '	Delivered	1141	1135	1200	1148	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Rollings,	Delivered	1330	1325	1344	1343	0.00	0.00	0.00	0.00	4.00
Bashful	Hager, Ro	Holmstea	Delivered	1400	1412	1416	1437	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Ewing, G	Delivered	1430	1345	1449	1407	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Lister, Da	No Show	1445	0000	1450	0000	0.00	0.00	0.00	0.00	2.00
Bashful	Hager, Ro	Watson,	Delivered	1500	1500	1520	1512	0.00	0.00	0.00	0.00	4.00



Edit Odometer Time

Click Tools then Edit Odometer Time

There may be times you need to edit the Time and Odometer readings entered for the drivers. The screen below was developed for that purpose.

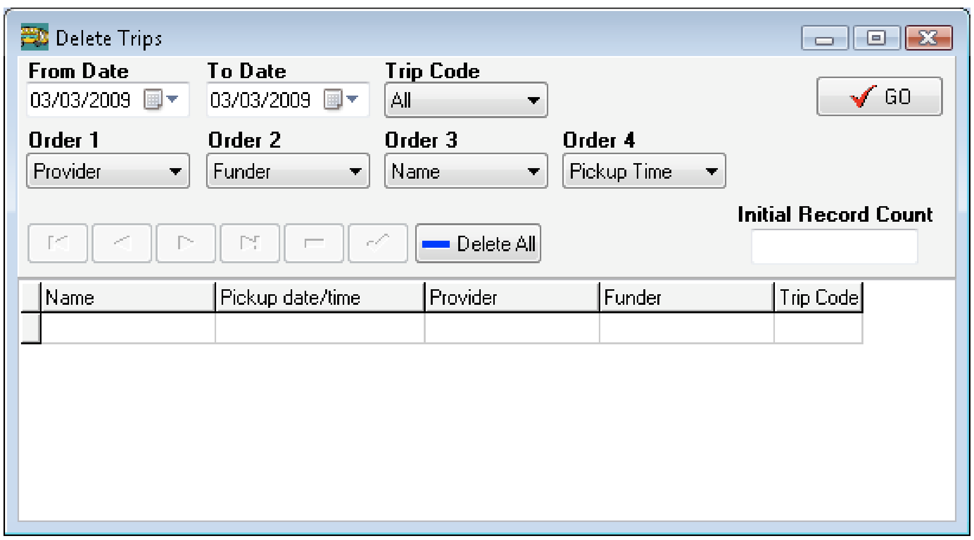


First select the way you want the information organized: by Route, Vehicle, or Driver. Then Select the option to be displayed (in this case we chose the Wiley Route). Set the date range. To add an event, click Insert Row. Mark the event by selecting Start Service, End Service, or Dead Head. Fill in the time and date you wish the event to be recorded. Change the mileage if applicable. To change the data in a row, simply highlight the row, change the data then click Update Row.

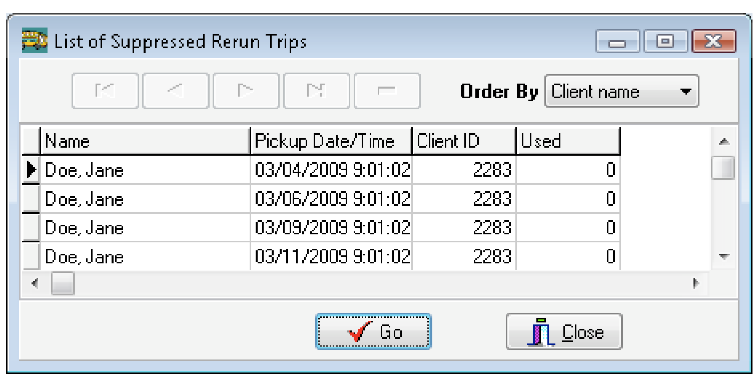
Delete Trips
Click Tools then Delete Trips

RECOMMENDATION: Carefully consider the impacts this operation will have on your system before deleting trips.

The screen displayed below is where you will enter a date or range of dates for trips to be deleted. Choose the date range and the trip code (delivered, canceled, no show, etc). Then click Go.



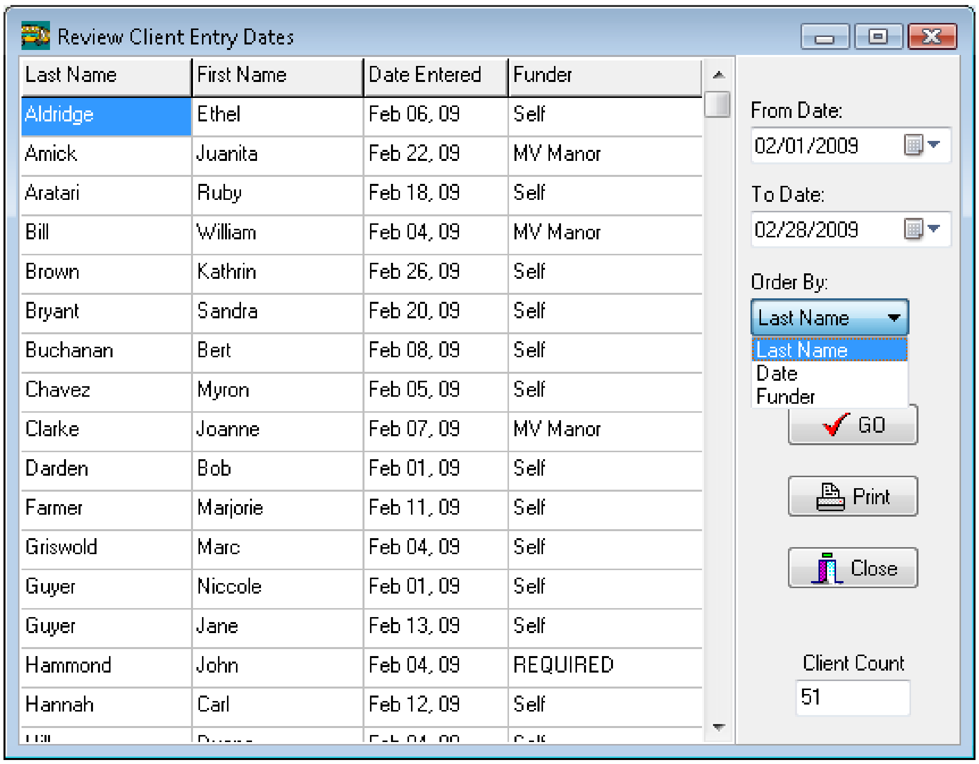
Review Suppressed Reruns
Click Tools then Review Suppressed Reruns



On occasion, some clients or the transit system may need to place a hold on rerun (subscription) trips. This feature is explained in the Easy Rides Users Manual. To review reruns placed on hold, a staff member will use the tool located here. The screen displayed below shows reruns that have been suppressed for a particular client.

Review Client Entry Dates
Click Tools then Review Client Entry Dates

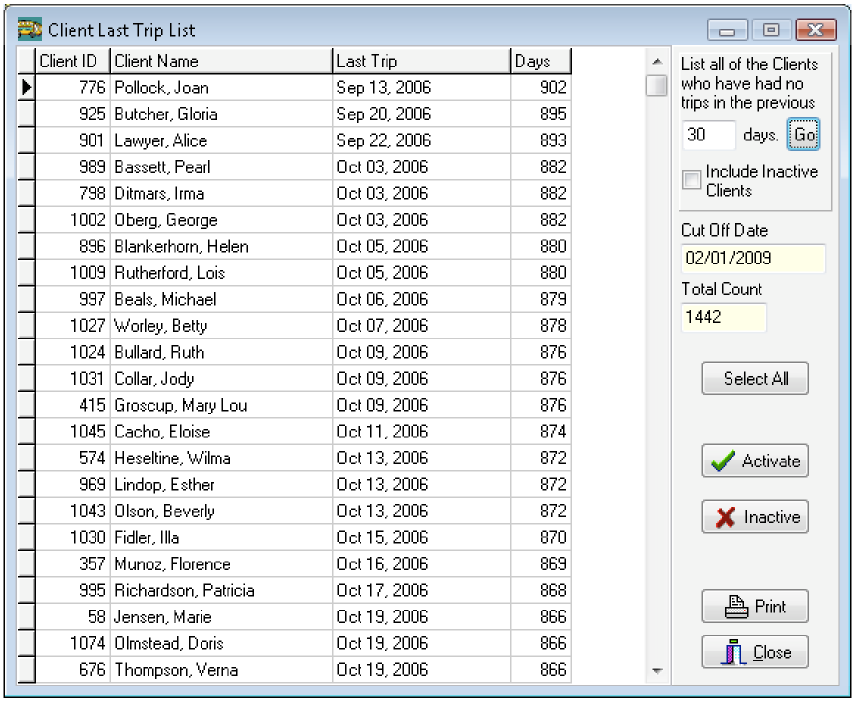
This tool will allow you to view and print a list of all clients entered into the system during a particular time frame. The screen displays the name, date entered and the default Funder for that client (if entered). The "order by" list allows you to choose the order in which information will be displayed. The number of clients entered is displayed in the lower right corner.



Review Client Last Trip Dates
Click Tools then Review Client Last Trip Dates

This tool will provide the transit system with a view of the clients who have NOT traveled in a selected period of time. This can be helpful for systems needing to track clients not actively using the system. Users can also select specific or all clients and either activate or inactivate them. See next page for screen display.

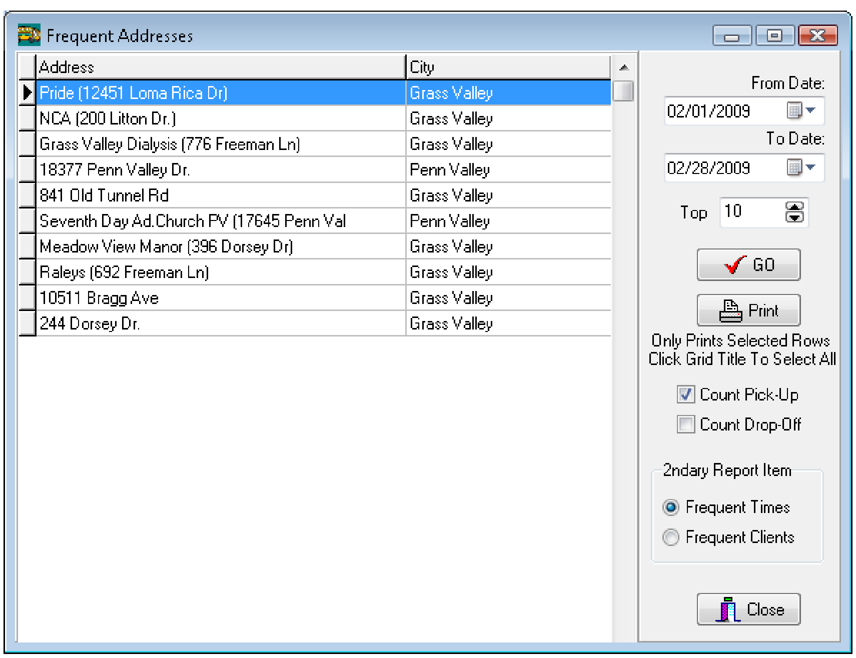
See image on the next page.



Frequent Addresses

Click Tools then Frequent Addresses

Choose this tool to see a list of addresses most frequented by your customers. This can be helpful for administrators who may want to ask certain agencies, department stores, and owners of local businesses for assistance with costs such as tickets, bus shelters, bus equipment etc. The system can tell local businesses how frequently their customers ride the bus.



Reset Open Schedule Counter
Click Tools then Reset Open Schedule Counter

An internal list (the Open Schedule Counter) keeps track of which Day Schedules are open. Its purpose is to warn users with a multi user system if they attempt to open a Day Schedule that is already open by someone else. If Easy Rides is terminated abnormally (e.g. a power outage) the counter will not reset itself. The next time Easy Rides is run, it will flag as "Open" a Day Schedule that is not open. Clicking on this submenu item will reset the Counter. It will not affect the data.