

**Easy Rides
Help System
Printed Documentation**



Mobilitat



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Easy Rides Help System

Welcome



Welcome to the Help System for Easy Rides users. This help file lets you easily look up the topics you're interested in, and gives you helpful hints and links to our online tutorials.

Are you new to Easy Rides? You might want to take a look at:

A Day in Easy Rides

Getting Started With Easy Rides

Setting Up the Easy Rides Database

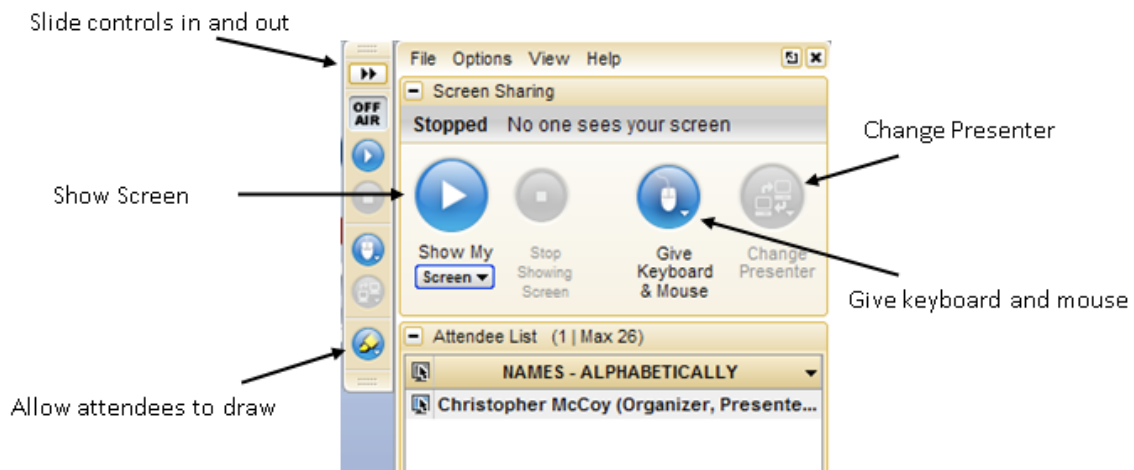
No Data

Getting Started With Easy Rides

GoTo Meeting

Go to <http://www.mobilitatsoftware.com/support> in your Internet browser.

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. A pop-up box will prompt you for a name and email address. A name is all that is needed. 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.

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. 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.

Installing Easy Rides See Also

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 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:

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

Go to <http://www.mobilitatsoftware.com/downloads>.

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.

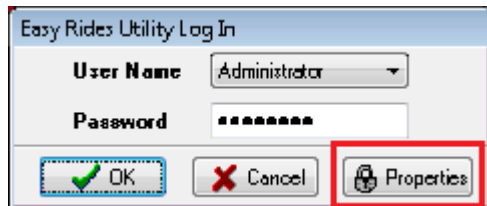
Selecting the Easy Rides icon



launches the program.



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.

Installing Easy Rides Client

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.

Selecting the Easy Rides icon



launches the program.

Click "Help" then "About"

Installing Easy Rides Backup

Easy Rides can only be backed up onto a hard drive on the server machine.

Go to <http://www.mobilitatsoftware.com/downloads>.

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).

Setting Up the Easy Rides 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

Launching EasyRides

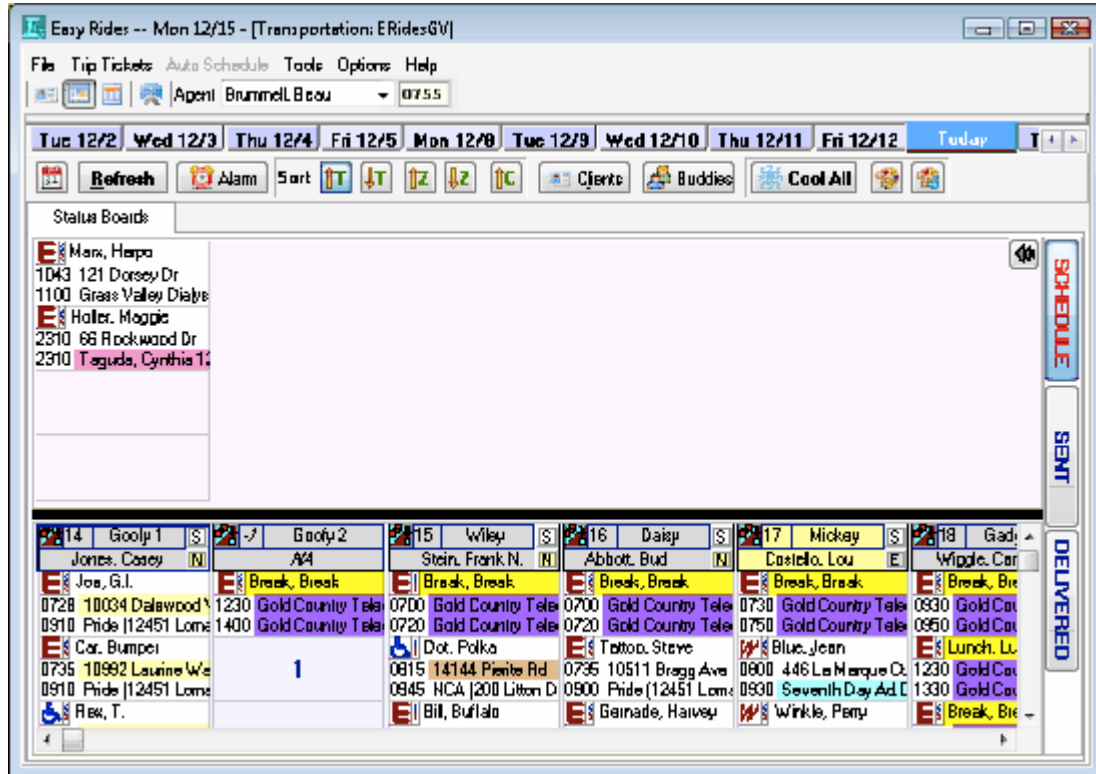
To start Easy Rides, click on the Easy Rides Icon on your desktop.

Selecting the Easy Rides icon

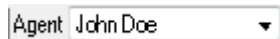


launches the program.

The first screen to open in Easy Rides is the Dispatch Board. From here we can access the Planner Board, Clients, Trip Tickets and set options.



Each agent logs in with their login or login/password making it easy to track who made changes to trip tickets.



Downloading from the Mobilitat Website

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 the website

Easy Rides Training Videos

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 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

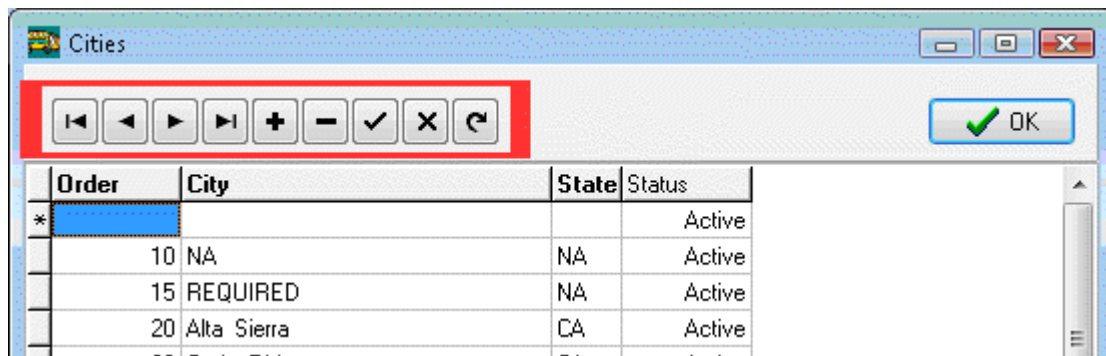
Click on the properties button and enter new passwords for both Administrator and User. If you choose to have lower security, check the box entitled "Start with Admin Password". This will cause all users to have access to all features of the Utility. If you want to restrict access to the portions of 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.

Information for Users

Easy Rides has some keystrokes and features that work the same no matter which data you're working with. 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 undue your last entry



Order Column

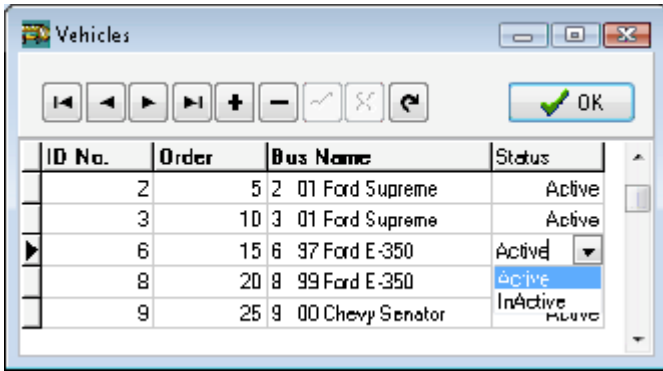
Items in the table can be put in any order you want them. By numbering the items in numerical sequence the table items will stay in the order you place them. By putting the same number in front of the items in your table, the items will automatically fall into alphabetical order.

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

By clicking on the word Active or Inactive in any row a down arrow will appear.

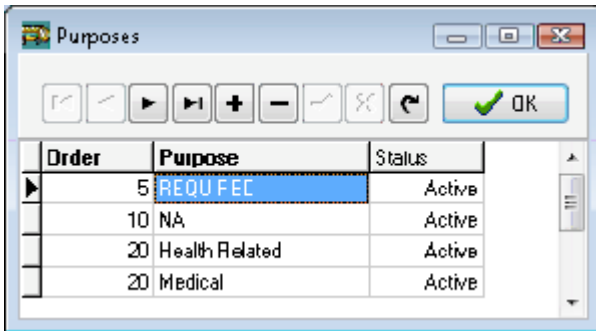
By clicking on the down arrow, the opposite word will appear.



By choosing "inactive" that particular bus will no longer be able to be chosen by a dispatcher. Never delete a bus or any other item in your data base 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.

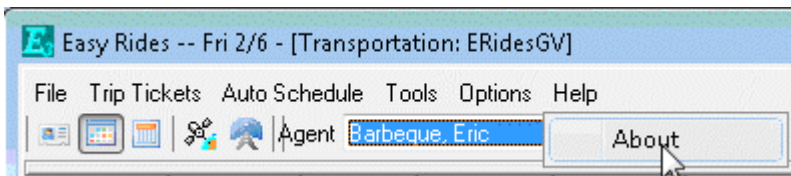
Each table should be adapted to appropriately include either REQUIRED or NA. Upcoming sections will make recommendations to include or exclude these elements.

Determining Your Software Version

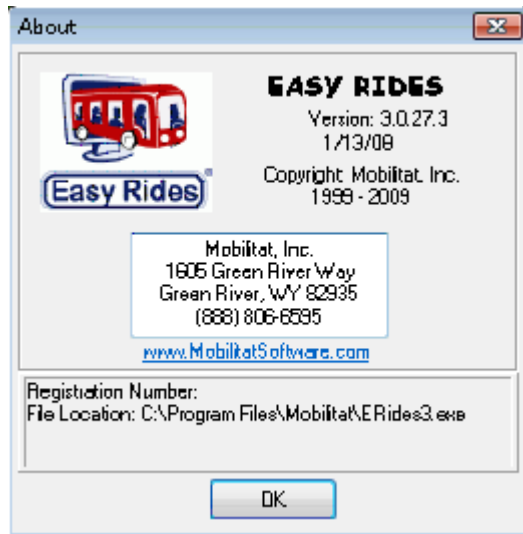
To be able to have the most recent upgrade, you need to know what version you are using now.

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".



You will see your version.



Software Updates

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/downloads>.

Select the appropriate download, and enter your username and password.

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

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

dbList

Mobilitat provides several additional fields that can be tailored to your unique needs. These are the dbList items.

To access the dbList, from the Easy Rides Utilities Click Admin, Clients & Attributes then DB List 1 or DB List 2, 3 or 4. Similar topics needed to be grouped together under the same DB List. Examples that other systems have used for these fields include:

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

Medicaid Code List

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. The Global Options are accessed through the Easy Rides Utilities.

Configuration:

Click Global Options then Configuration

There are three sections within Configuration: Global Options, Autoscheduler, and GIS.

The Global Options configuration itself has the menu options of Global Options and Custom Lists.

Global Options Configuration

Global Options -- Click Global Options then Configuration

Address Select Only

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.

Log Vehicle Odometer/Time

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

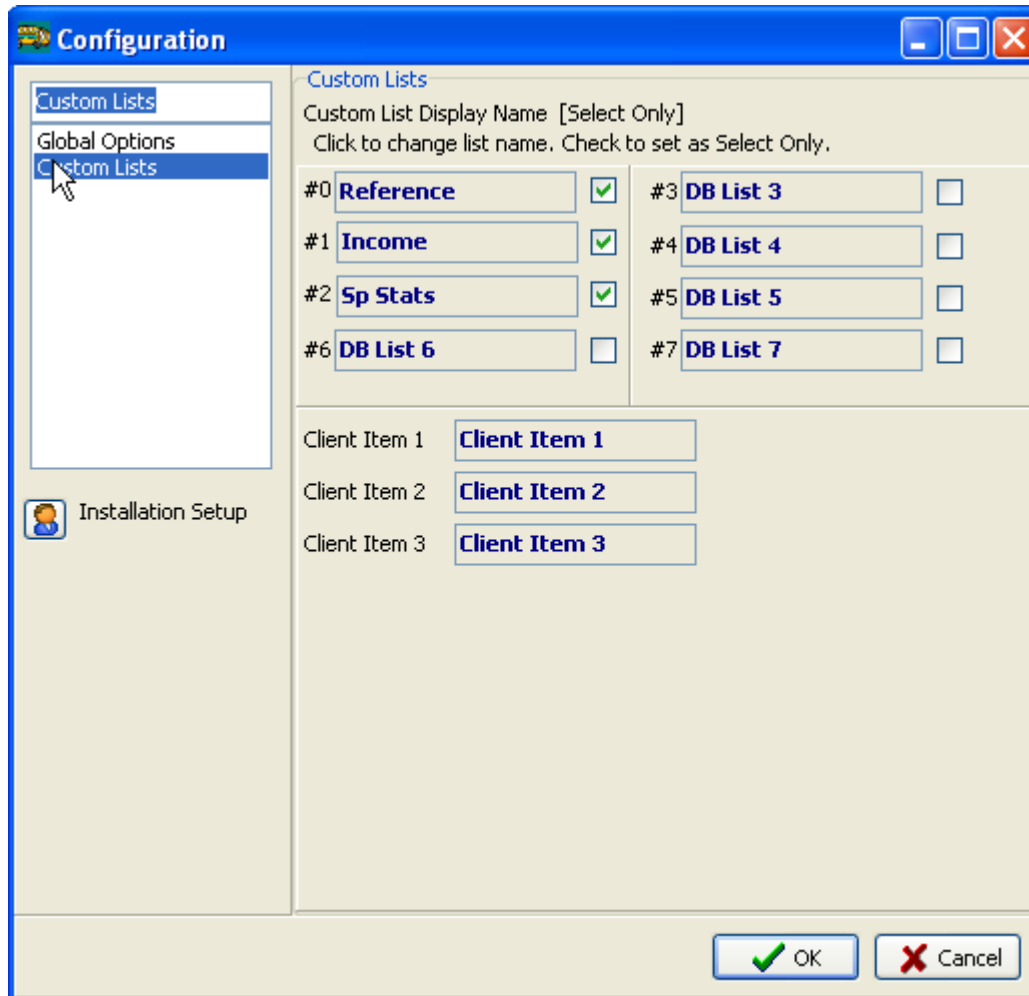
Select the default state for geo-coding

Installation Setup

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

Global Option Custom Lists Configuration

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.



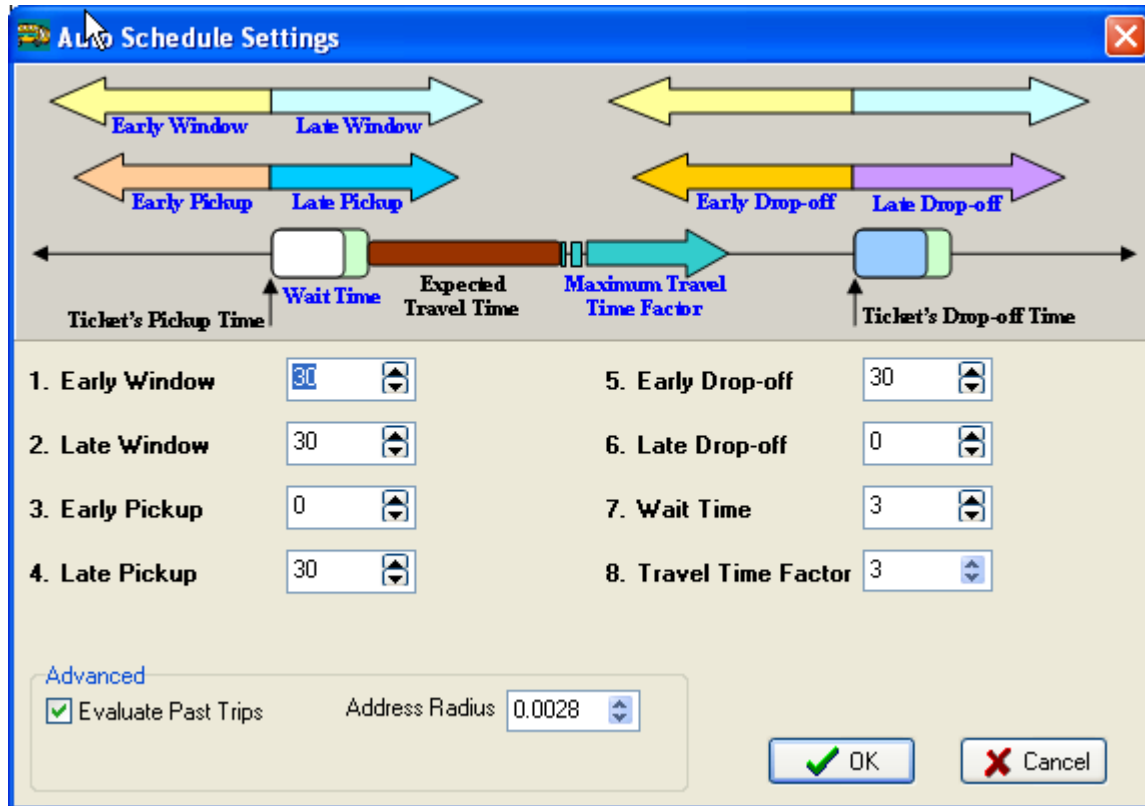
Global Option Ride Reminder Configuration

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.

Global Options Autoscheduler

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.

Global Options G.I.S.

Select Global Options then GIS.

Predict Stop Times Point-to-Point

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.

Calculate Mileage/Time

This option controls the Archive feature for calculating Odometer or Time values based on GIS routing.

Archiving

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.

From Easy Rides Utilities Click Archive, then Move trips to the Archive

Clicking on "Move trips to the Archive" will display the screen below.

The screenshot shows the 'Archive' dialog box with the following components:

- Calendar:** A calendar for March 2009. The date 03/02/2009 is selected. The text below the calendar says 'Today: 03/02/2009'.
- Instructions:** 'Select the days to archive on the calendar. Drag-select to choose multiple days (up to 31).' and 'Archive Trips with Final State'.
- Checkboxes:**
 - Delivered Trips
 - Suspended Trips
 - No Show, Canceled, Denied Trips
 - GAP Trips are never archived
- Filter Section:**
 - Text: 'Create a filter to remove other trips for client names which are not intended to be archived'.
 - Input field: 'Find A'.
 - Table of Client IDs and Names:

Client ID	Name
381	Adams, Nita
824	Adams, Arlene
825	Adams, David
2272	Adams, Paul
 - Filter out trip tickets containing: 'Lunch, Lunch Break, Break'.
- Summary:** '0 Archive Ready Trips for the selected dates and filters.'
- Table:** A table with columns: Client, PU Time, PU Address, DO Address.
- Buttons:** 'Review', 'OK', and 'Cancel'.
- Footer:** 'Click Review first to enable OK button'.

You want to make sure no one is working in 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.

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.

Archive

March, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
22	23	24	25	26	27	28
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 03/02/2009

Select the days to archive on the calendar. Drag-select to choose multiple days (up to 31).

Archive Trips with Final State

- Delivered Trips
- Suspended Trips
- No Show, Canceled, Denied Trips
- GAP Trips are never archived

Create a filter to remove other trips for client names which are not intended to be archived

Filter
Find A

Client ID	Name
381	Adams, Nita
824	Adams, Arlene
825	Adams, David
2272	Adams, Paul

Filter out trip tickets containing:

Lunch, Lunch
Break, Break

0 Archive Ready Trips for the selected dates and filters.

Client	PU Time	PU Address	DO Address

Click Review first to enable OK button

OK Cancel

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

ERUtility3

Your trip archiving has been completed

OK

Archiving also allows you to **Delete Old Day Schedules, Delete Old Bulletin Board Messages, and Calculate Odometer/Time with GIS**

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.

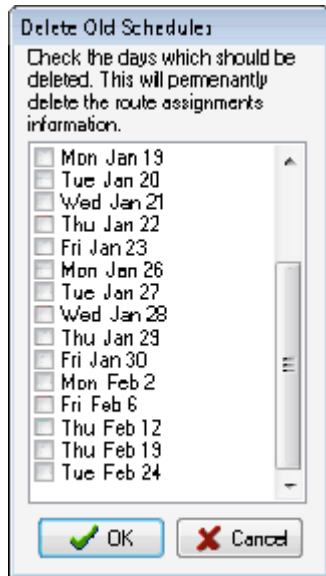
Confirm

Please check to see that no one else is connected to the database before you attempt to delete old Day Schedules.

Delete old Day Schedules now?

Yes No

Click Yes then click on each box to the left of the day schedules you 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

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.

Clients

About Good Client Data

To speed the process of scheduling trips, information about riders is input into the computer prior to scheduling a trip for a client. When systems are first starting out, some information about clients may not be readily available. It's best to collect information on clients and input it as part of the initial set - up process. To assist you, Mobilitat has developed a Customer Information Sheet that includes the key fields that need to be completed for each rider. Please see the "Customer Information Sheet " and adapt it to best meet your needs. There are some blank spaces on the document that enable you to customize it for your system. Please make sure that you include your system's name and phone number before reproducing the form and providing it to customers riding the bus.

If you already maintain a computerized complete customer list, it may be possible to convert that data into a format that can be used by Easy Rides. Please contact our office at 888 - 806 - 6595 to determine if that is feasible.

Each client needs to have their information completely filled out including name, address, birth date (the client's age is automatically calculated by EasyRides), notations on special needs (if any), ethnicity, gender etc. This data needs to be added to the database before trips are scheduled for that individual. The birth date and special needs and disability status are especially important to accurately input. This information is translated into icons that appear next to each riders name on the dispatch board.

Client Attributes

To provide for consistent reporting some client attributes have been pre-programmed into the software. These include Age Groups and Ethnic codes.

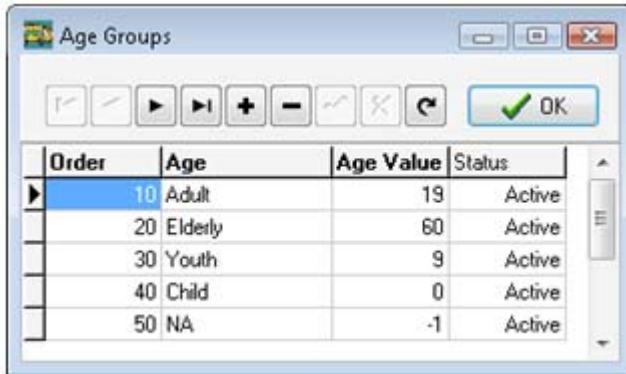
Client Attributes are entered in the Easy Rides Utility section. Click on Admin, Clients & Attributes then Age Groups.

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

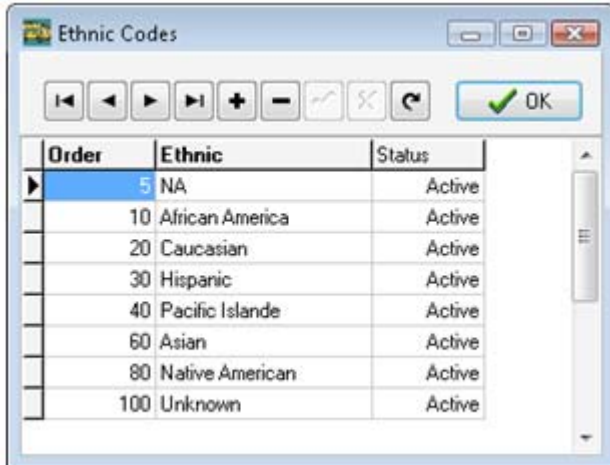
Why Ethnic Codes Are Important

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.

To add Ethnic Codes, enter the Easy Rides Utilities, then lick 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



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.

Client Status

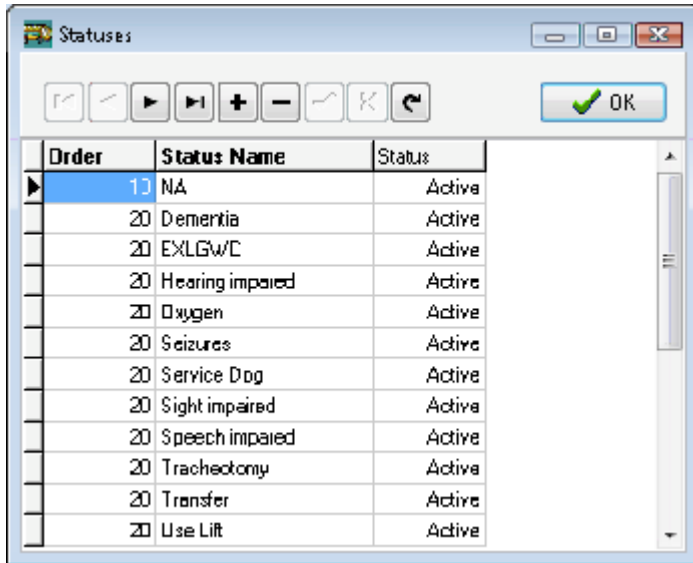
Statuses can be used to designate Client specific attributes such as:

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

This list can be customized for your needs.

To add Statuses, enter the Easy Rides Utility and click on Admin, Clients & Attributes then 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.



Client Affiliations

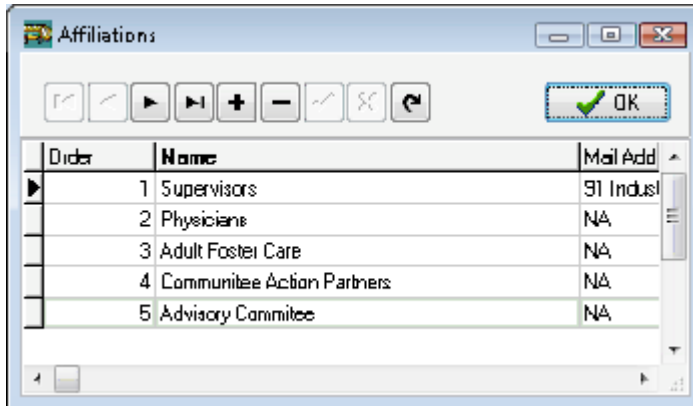
Affiliations can be used in conjunction with Contacts & Contributors. Your system may have certain groups who ask for information on your statistics or you may need to list your contacts under a particular group for mailing purposes.

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.
5. Click the checkmark
6. Click "OK".

Note: In order to use affiliations for mailing labels, it is best to separate city, state and zip.

From Easy Rides Utilities, Click on Admin, Clients & Attributes then Affiliations.



Contacts and 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.

To add Contacts and Contributors, enter the Easy Rides Utility and click on Click on Admin, Clients & Attributes then Contacts & Contributors.

Affiliation	First Name	Last Name	Relation	Notes
	Dr.	Hfuhruhurr	Physician	

Phones: 555-1212

Address: 123 Sesame St

NA New York NY 87654

Call Mail Active

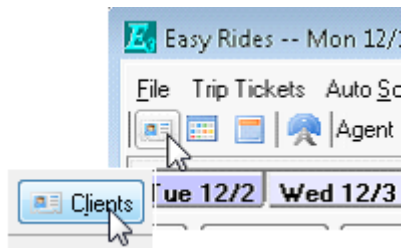
Last Name Filter: h Detail View

OK Close

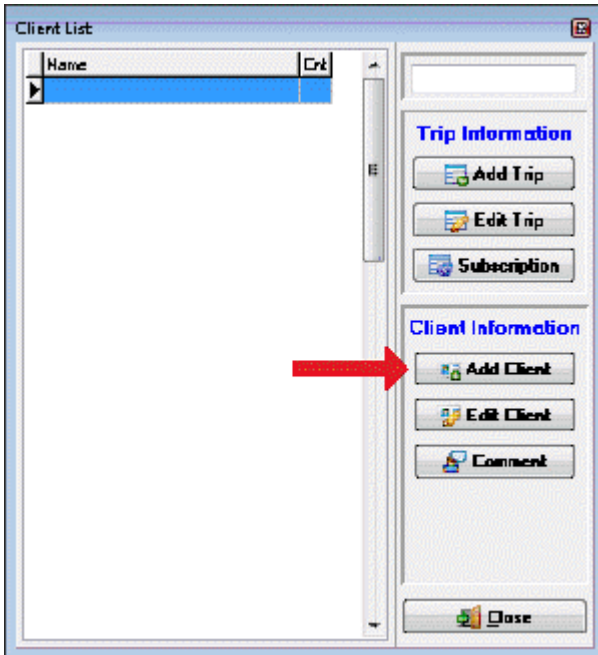
The form can be used several ways. As a general contact, you would enter just the contact information. If this contact is associated with an affiliation, you would click inside the Affiliation box and a list of the affiliations will be available for you to choose from. By clicking on the “C” box, the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

Adding Clients See Also

To add information about a client, select one of the “Clients” buttons.



This opens the Client List window. Click the “Add Client” button.



After selecting “Add Client” a blank Client page will appear with some default values that you have established previously in the database. Fill out the rider’s first name, last name, phone number, and other required fields.

The Client Form is divided into two tabbed sections.

The first section contains the personal information for the client. Duplicate names are not permitted so consider including middle names or initials.

If the Home Address and Mailing Address are the same, click the lightning bolt ellipsis to copy the info to the Mailing Address field.

The Lightning Bolt:



The second part of the form contains the default information that you would like to have entered automatically each time a new Trip Ticket is created for this client. For example "Telecare" will be automatically entered in the Providers field of each new Trip Ticket for this client.

Client		
First and Middle Name	Last Name	ID
Jane	Doe	2283
Client Details		Ticket Defaults
Home Address		Apt Site
123 Sesame St		Newton
SSN	Gender	Female
BirthDay	Ethnicity	Native American
Med ID	Affiliation	
Authorized	Client Itc	
Expiration	Client Itc	
Lock Out	Client Itc	
Lang Pref	English	
Client Note	NA	
Mailing Address	Emergency Contact	
123 Sesame St		
Grass Valley CA 95945	Other	
Phone Numbers		
(555)987-6543		
<input type="checkbox"/> No automated calls		
Print	OK	Cancel

If you wish to require the person creating a new Trip Ticket to enter information at the time the Trip Ticket is created, then leave the word "REQUIRED" in the field.

If you wish to ignore a field when a new Trip Ticket is created, leave the word "NA" in the field. For example, when a new Trip Ticket is created for this client the Vlntr Driver field will not need to be entered.

The Reference field may be used to record special medical identification or permit codes for the client. DBLists can be named and used for any special information you may need to record.

SSN is a field that can be used to store social security numbers. Please seriously consider not keeping riders social security numbers unless required by a funder. This will reduce opportunities for identity theft.

Expiration is the date that the client's permission to ride expires. The Tools->Check Permit Status item in the Main Menu provides a list of all clients who are about to reach their Expiration date. Any date prior to Jan 1, 2000 is ignored by Easy Rides.

The Default Trip Note field contains a note that will be automatically added to the Trip Ticket when it is created for the client and it will also be printed on the Driver Manifest for the driver to see. For example "Rider hard of hearing do not use horn, push door bell" would be type of message for this field.

The Client Note field contains notes for the dispatcher to view when creating a Trip Ticket but is not displayed on the Driver Manifest. "Client has Alzheimer's confirm scheduled trips with daughter at 555-806-6595" would be a type of message for this field.

If there is a change in the client's information or an error is made in data entry this can be corrected by editing the client record.

Deleting Clients

Clients can only be deleted via the ER Utility. **Before deleting a client carefully consider the full impact.** Though a rider may have moved away or even died, they did ride your system at one time. Deleting a client can reduce the accuracy of reports. Individuals who have not ridden in 11 months are still counted in annual reports. Your first choice should not be to delete a client, or route or driver. In some instances you can make an option like a vehicle, or a route or a driver inactive. Their name won't then appear on the list from which to select.

If you decide you must delete a client record, access the Easy Rides Utility. Then:

Select Admin

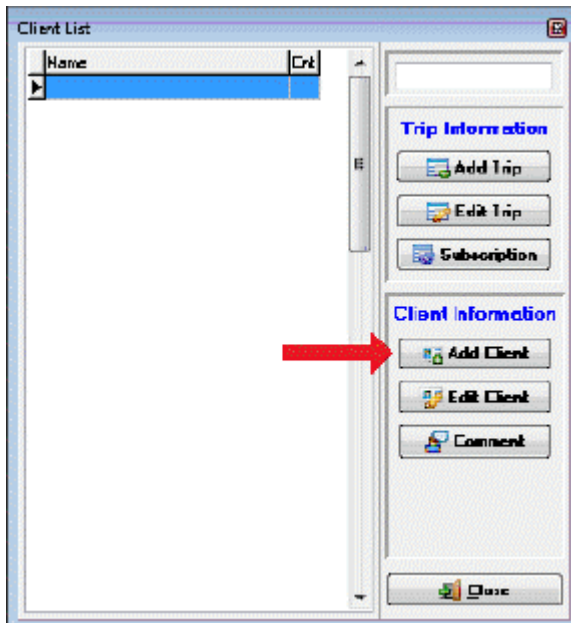
Select Clients and the Client List

This list will contain one button – the “Delete” button. Clicking the Delete button will delete the selected client from the Client table.

Editing Clients

To edit information about a client, select one of the “Clients” buttons. This opens the Client List window. Locate a Client by typing the first few characters of the last name into the selection box.

Easy Rides treats upper case characters the same as lower case in the Client List. For example “Jane Doe” is the same as “JANE DOE”. **RECOMMENDATION:** Input all client data using proper upper and lower case to insure the data is “mail ready” when you compile mailing labels.












Click to highlight the client name and then select the “Edit Client” button. A Client Form containing the information for that selected client will be displayed

Make the changes to the client data as needed, and click the “OK” button when completed.

Required and Important Fields

Each client needs to have their information completely filled out including name, address, birth date (the client's age is automatically calculated by EasyRides), notations on special needs (if any), ethnicity, gender etc. This data needs to be added to the database before trips are scheduled for that individual. The birth date and special needs and disability status are especially important to accurately input. This information is translated into icons that appear next to each riders name on the dispatch board. For example:

	Ambulatory adult - capable of walking
	Ambulatory youth, 18 years and younger (editable) - capable of walking
	Ambulatory elderly, 60 years and over (editable) - capable of walking
	Blind
	Disabled - Open to interpretation. Some use it for cognitive disabilities
	Hearing Impaired
	Wheelchair
	Walker/Cane
	Other - Anything not addressed by the previous discriptions

Ticket Defaults

If you wish to require the person creating a new Trip Ticket to enter information at the time the Trip Ticket is created, then leave the word "REQUIRED" in the field.

If you wish to ignore a field when a new Trip Ticket is created, leave the word "NA" in the field. For example, when a new Trip Ticket is created for this client the VIntr Driver field will not need to be entered.

The Reference field may be used to record special medical identification or permit codes for the client. DBLists can be named and used for any special information you may need to record.

SSN is a field that can be used to store social security numbers. Please seriously consider not storing riders social security numbers unless required by a funder. This will reduce opportunities for identity theft.

Expiration is the date that the client's permission to ride expires. The Tools->Check Permit Status item in the Main Menu provides a list of all clients who are about to reach their Expiration date. Any date prior to Jan 1, 2000 is ignored by Easy Rides.










Default Trip Note field contains a note that will be automatically added to the Trip Ticket when it is created for the client and it will also be printed on the Driver Manifest for the driver to see.

For example "Rider hard of hearing do not use horn, push door bell" would be type of message For this field.

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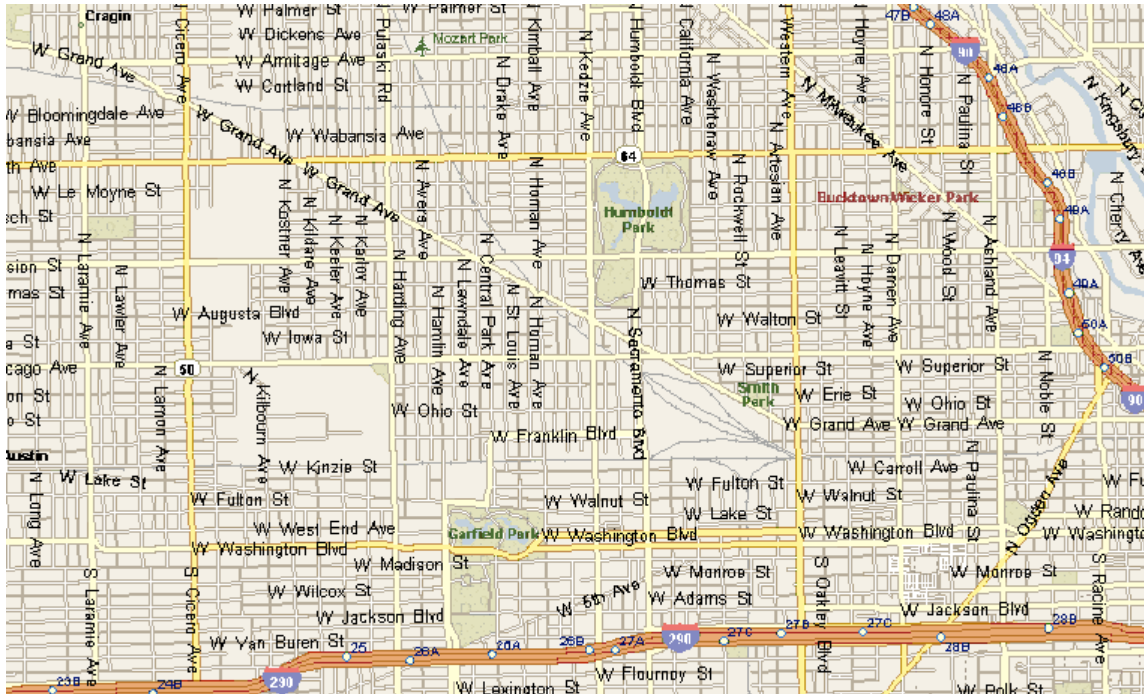
Client Icons

These are the client special needs icons:

	Ambulatory adult - capable of walking
	Ambulatory youth, 18 years and younger (editable) - capable of walking
	Ambulatory elderly, 60 years and over (editable) - capable of walking
	Blind
	Disabled - Open to interpretation. Some use it for cognitive disabilities
	Hearing Impaired
	Wheelchair
	Walker/Cane
	Other - Anything not addressed by the previous discriptions

Easy Rides Geography

Understanding Easy Rides Geography See Also
 Defining Service Boundaries



When people first traveled there was no reason for maps. People just followed the food. Later, they didn't use maps because there weren't markers or tools to determine placement. Perhaps you haven't needed a map with your transit system. It may be "we serve the city" or it may be that you and your drivers just know where to go. But a computer is much simpler. It does not know what you know.

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.

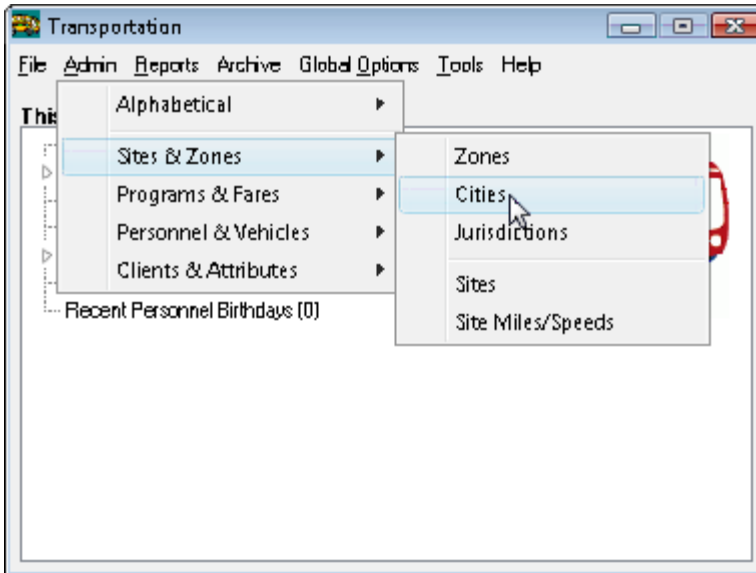
Site – Sites are the smallest geographic element described in the software. One or more sites are combined together to make zones. In urban areas a site might be the distance it takes the bus to travel in about 5 minutes, in less densely populated areas a site may be an area driven by a bus in 20 or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

Adding Cities and Zones See Also

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.

Cities

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



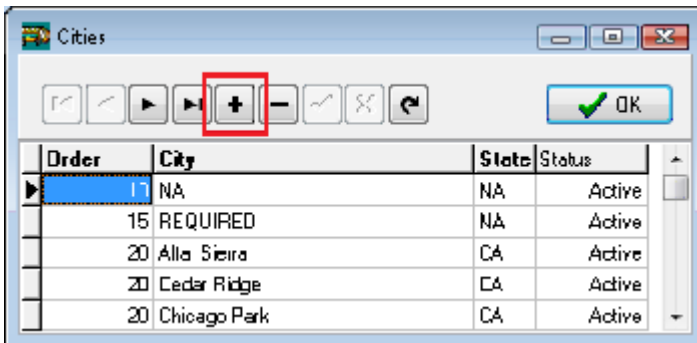
Click on the Plus sign and an empty row appears

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.

Zones

Click on Admin, "Sites and Zones" then Zones

Order	Zone Name	Description	Status
	NA	Must appear in LR	Active
100	Brownsville	NA	Active
100	Foresthill	NA	Active
100	Grass Valley	NA	Active
100	La Barr Meadows	NA	Active
100	Lake Wildwood	NA	Active
100	Lincoln	NA	Active
100	Nevada City	NA	Active
100	North GV	North of McKnight	Inactive
100	Penn Valley	NA	Active
100	Rough and Ready	NA	Active
100	S. Grass Valley	NA	Active
100	South GV	South of McKnight	Inactive
100	Yuba City	NA	Active

The Zone table is shown above. 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.

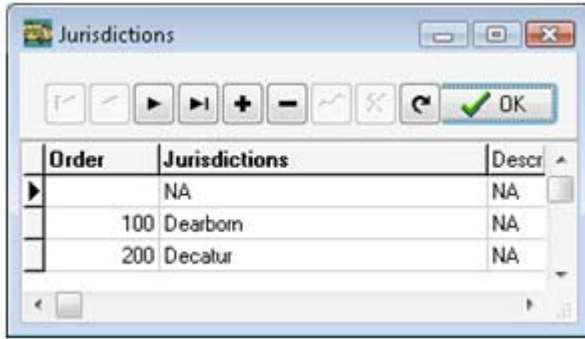
Zone colors can be changed at any time. Generally zones with a pastel back ground and dark lettering are the easiest to read for the majority of the population.

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.

Adding Jurisdictions and Sites See Also

Jurisdictions are a way to group sites together for reporting purposes. For example, you could assign site A, B and C to Jurisdiction: Buchanan County, and sites D,E and F to Jurisdiction: Wayne County. Then you can run reports based on jurisdiction.

For example, 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.



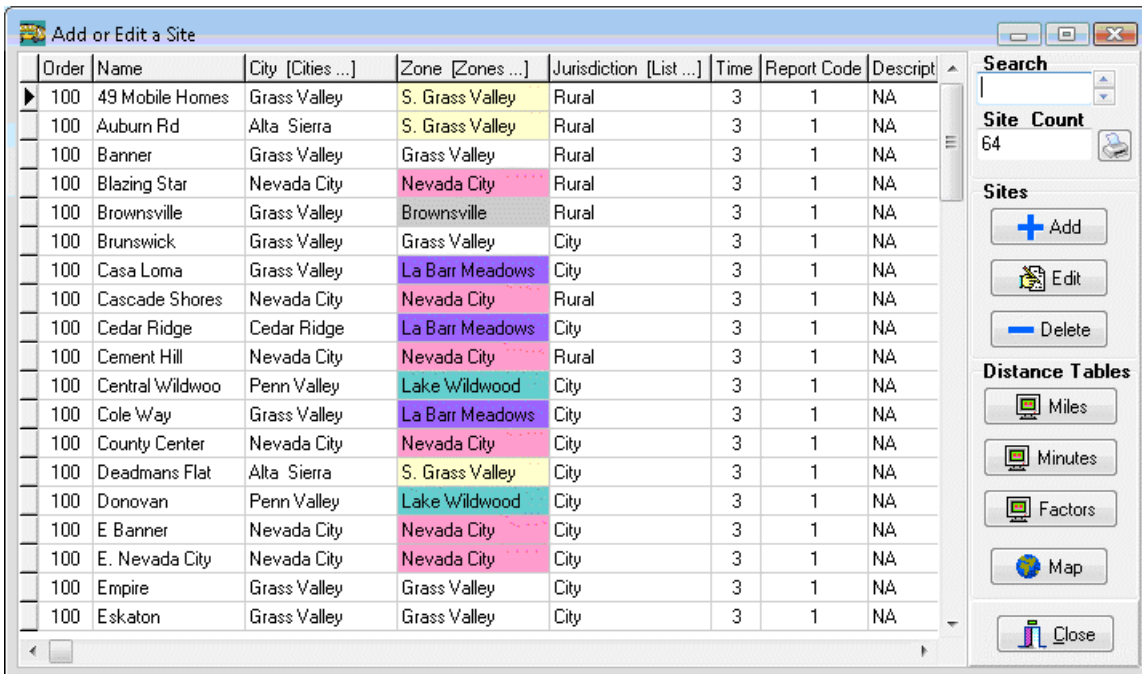
RECOMMENDATION: Include the option of having NA in this table.

Entering Jurisdictions

In the Easy Rides Utility, click on Admin, “Sites and Zones” then Jurisdictions.

Entering Sites

In the Easy Rides Utility, click on Admin, “Sites and Zones” then Sites



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

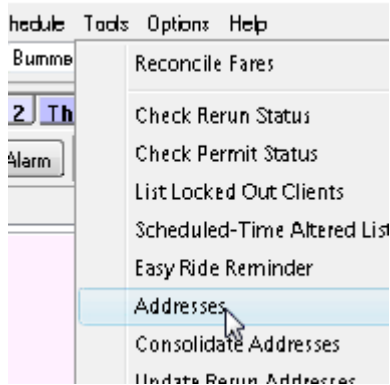
RECOMMENDATION: REQUIRED should not be listed as an option. NA can be included as an option for unusual circumstances.

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.

Understanding Addresses

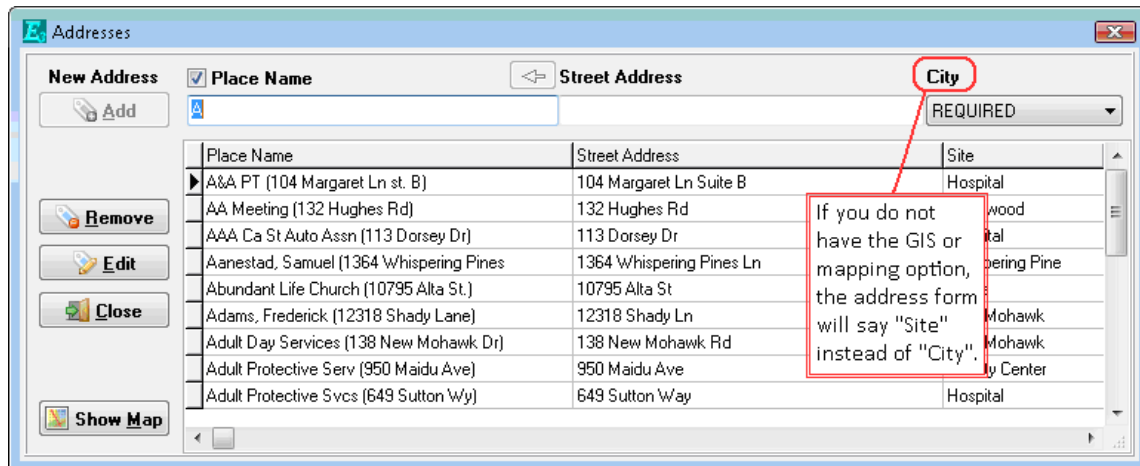
Adding Addresses See Also

From the dispatch board, select Tools, then Addresses.



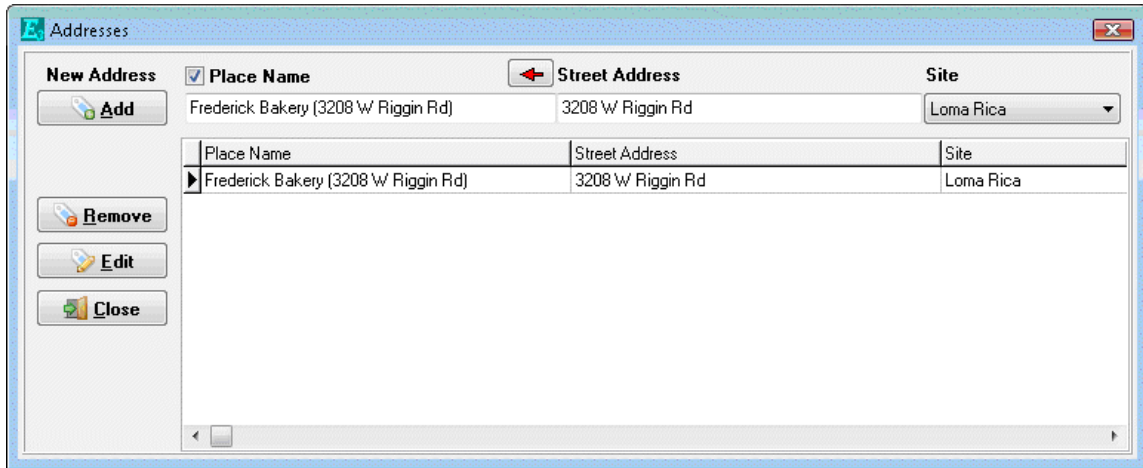
The Address Table will be used as a master list for all of the addresses and destinations in the database. Addresses can be inserted, removed or edited using this form. It should be noted however, that addresses that have been used in a client or trip record should NOT be removed, but instead edited or consolidated with another address.

On the address form, the "Place Name" refers to a short descriptive name for a place such as "Anthony Apartments" or "Post Office" or "County Hospital". The "Place Name" is what displays on the Driver Manifest - later we'll discuss how to insure drivers have all the information they need for a trip. The "Street Address" refers to the actual numbered street address for a place. The "City" or "Site" is where the address is located. The "City" or "Site" information will come from a drop down menu in the upper right of the table. If you have the GIS enabled version of Easy Rides the city will be automatically assigned.

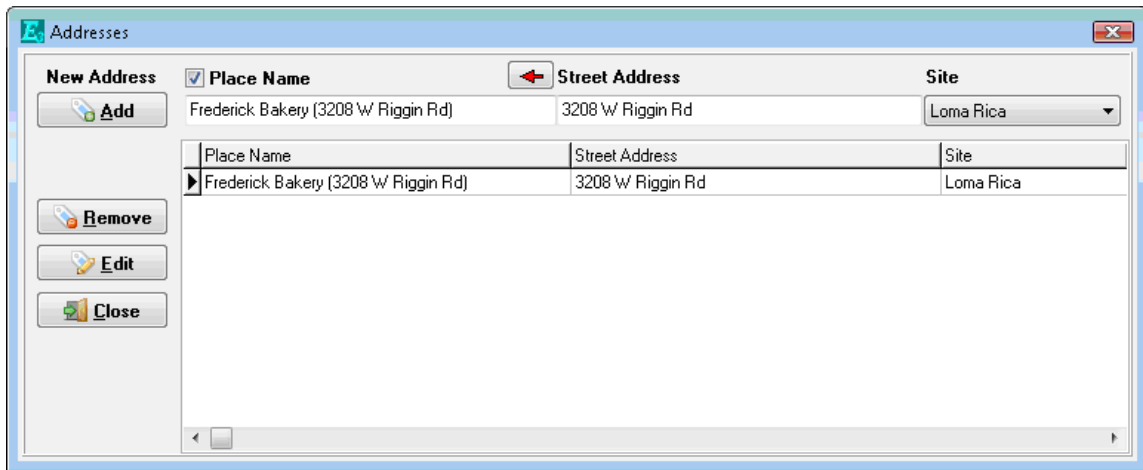


During initial setup it is important to add as many frequently visited location addresses to the database as possible. Adding these addresses now will save schedulers and others hours of time later. You will add residential addresses for Clients as you add or edit clients.

When adding a business address there should be a checkmark in the "Place Name" box to allow for typing the name for the place (there is usually no checkmark when adding a client unless for an apartment or hospital name). Begin by typing the "Place Name" then the Street Address. Next, click the red arrow. This copies the street address to the "Place Name" field within a parenthesis. The "Place Name" is the field placed on the driver manifest. Drivers will now see both the business name and the street address where they will have rides.



Tab to the city or site, click on the dropdown arrow and select where the address is located. Notice that the “Add” button becomes active once you select a City or Site. Once you have completed all three fields, click the “Add” button. This places the new address into the address table. Any addresses stored below the first line are part of the address table.

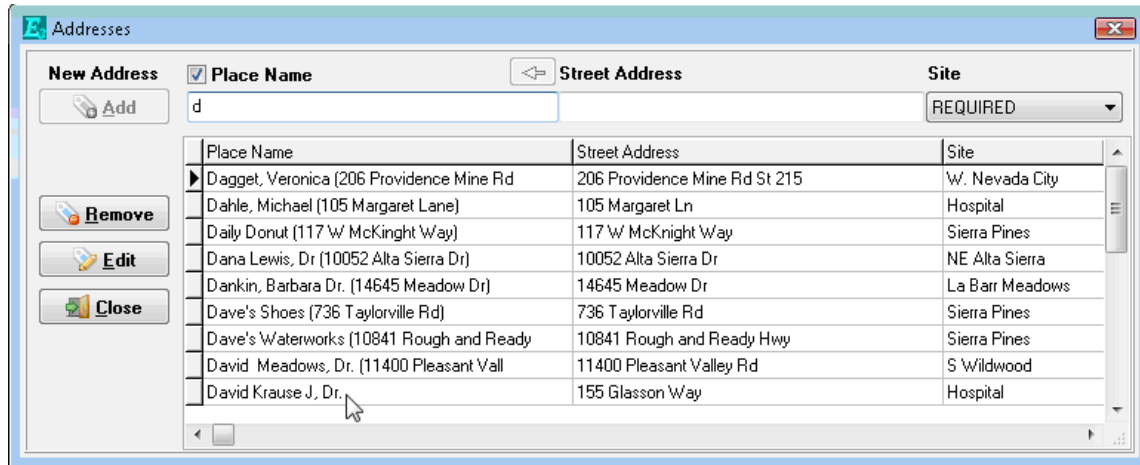


Editing Addresses See Also

There can be undesirable consequences to deleting or removing addresses. Deleting addresses can corrupt the database and provide inaccurate reporting. It is recommended users instead edit or consolidate addresses.

To Edit Addresses, from the dispatch board, select Tools, then Addresses.

The list of addresses appears after the first blank line on the form. To find an address, key in the place name or type the first few letters of the place name. In this instance the frequent addresses are those that begin with the letter “d”. Notice Dr. David Krause’s listing does not display the address in the “Place Name”. It could be confusing for drivers to not know the address. In the following example the “Place Name” will be changed to include the Doctor’s address.



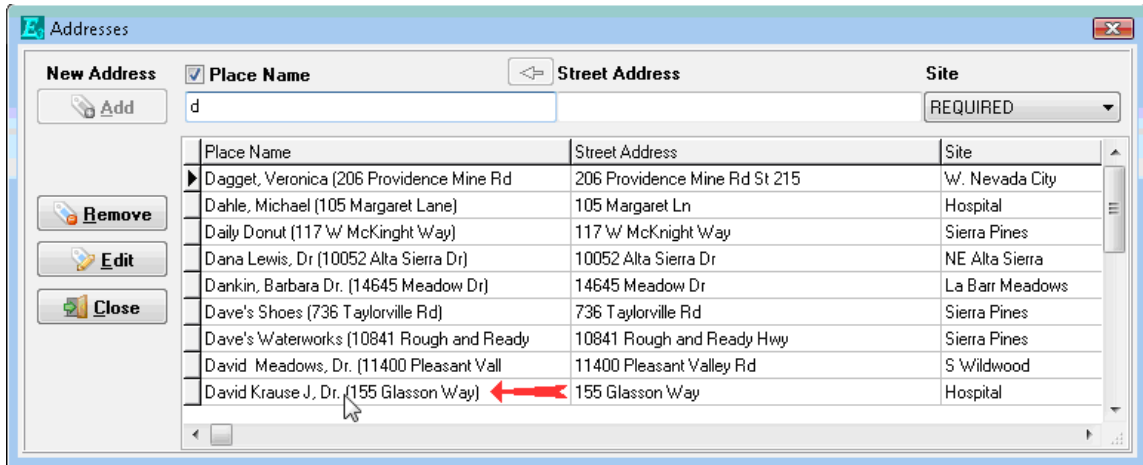
Select (single-click) the address you want to select, in this case David Krause J, Dr., from the list. Click on the "Edit" button. Make the changes in the "Edit Location" window.

In this case type or copy/paste the address information behind the David Krause J, Dr. "Location Name". Consider placing the address in parenthesis for consistency. If your software is GIS enabled make sure the Geocode Address field is checked so a correct geo-code can be assigned through the MapPoint software. If you do not have GIS enabled software the Geographical Information area will be blank.



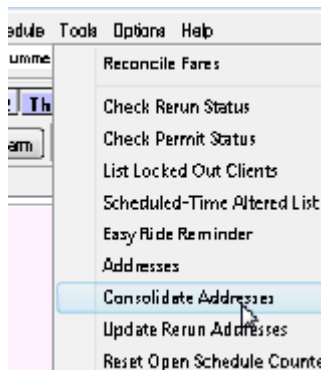
If you need to track services for frequent drop off addresses, you can check mark "Frequent Drop off Address", making them easier to report on as a collection of "locations of interest".

When you have completed data entry, click "OK" at the bottom of the form. Now when you see the frequented address list, Dr. David Krause has the correct addressing format in "Place Name" and will appear on manifests consistently.



Consolidating Addresses See Also

The "Consolidate Addresses" tool was designed to correct the situation of multiple, slightly different addresses . First from the dispatch board, select Tools, then Consolidate Addresses.



In the example below, the letter "n" was typed in the "Place Name" field. This displayed a list of all places beginning with "n". There are two instances of the high school listed at 11761 Ridge Rd. We only want one so we'll remove the extra. First, we double click the address we want to retain. That places it below the other address.

Consolidate Addresses

Find

Place Name Street Address

n

Place Name	Street Address	Site	Latitude	Longitude	ID
Northern Queen Motel (400 Railroad Ave)	400 Railroad Ave	New Mohawk	3274518287	3276188891	1226
Northridge Rest (17464 Penn Valley Ct)	17464 Penn Valley Dr	N. Penn Valley	182131768	3931347063	1827
Northridge Rest (773 Nevada St)	773 Nevada St	E. Nevada City	1588258028	3951218213	1228
Novak's (305 Broad St)	305 Broad St	W. Nevada City	3113586051	3438856021	2821
NUHS (11761 Ridge Rd)	11761 Ridge Rd	Morgan Ranch	140363516	3328336311	2152
NUHS-Theatre (11761 Ridge Rd)	11761 Ridge Rd	Morgan Ranch	140363516	3328336311	2150
NV City Hall (317 Broad St)	317 Broad St	W. Nevada City	3383077964	3568993987	1125
Nv City Post Office (200 Coyote St)	200 Coyote St	W. Nevada City	3089860082	703266696	1805
NV Commons Apt (775 Old Tunnel Rd)	775 Old Tunnel Rd	Loma Rica	3799617391	038408732	1141
NV Theatre (401 Broad St)	401 Broad St	W. Nevada City	706811563	3616856724	1206
NV Union HS (Ridge Rd)	Ridge Rd	Eskaton	3831925928	3543863147	1208
NVCI Auto (345 Railroad Ave)	345 Railroad Ave	E. Nevada City	2569452682	781833302	1102
NVCI Barber (805 1/2 Zion St)	805 Zion St	New Mohawk	3106643689	3872444362	1105
NVCI Christian Fellowship(12262 Sutton Way)	12262 Sutton Way	Banner	3313235042	3866243761	1109
NVCI Elementary School (505 Main St)	505 Main St	W. Nevada City	2547519534	3579379215	1111
NVCI Elks Bldg (Hwy 49 N)	SR-49	Banner	3689570119	005632322	1123

Replace

Place Name	Street Address
NUHS (11761 Ridge Rd)	11761 Ridge Rd

Edit

Place Name **Street Address**

NUHS (11761 Ridge Rd) 11761 Ridge Rd

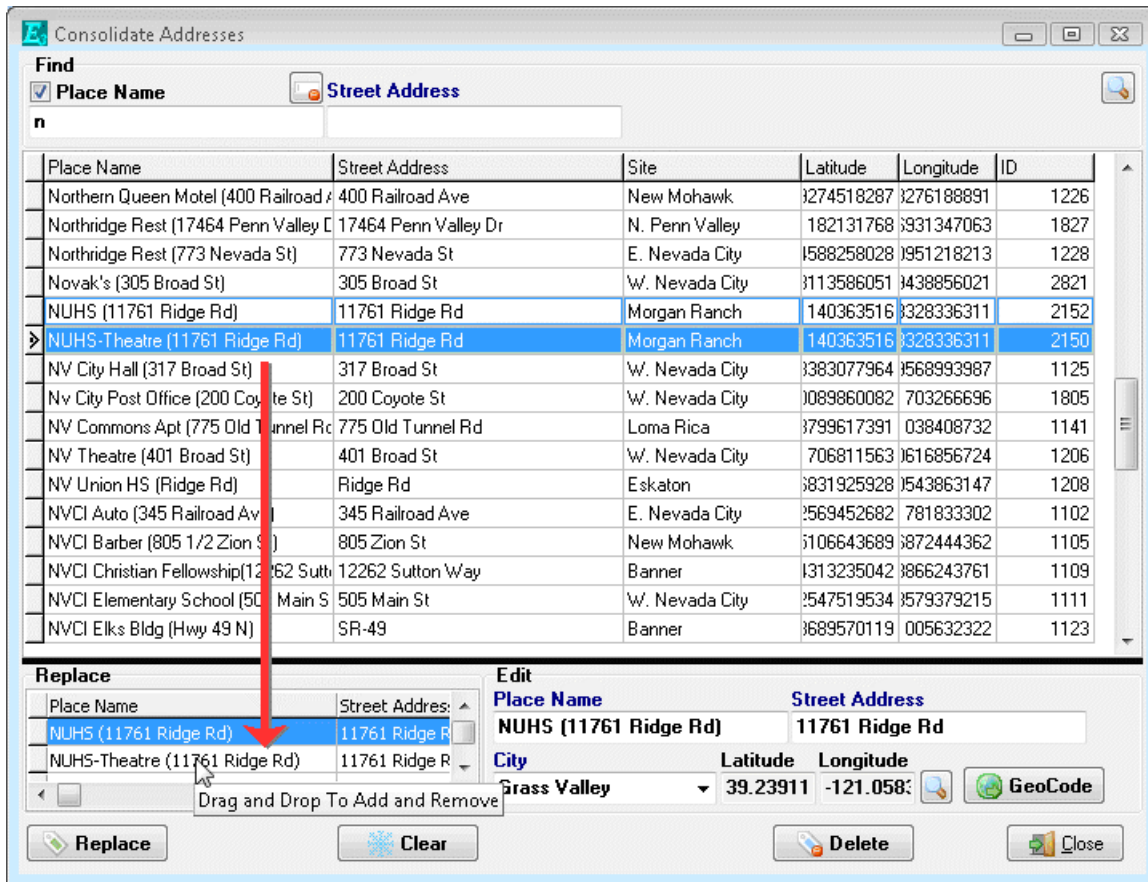
City **Latitude** **Longitude**

Grass Valley 39.23911 -121.058

GeoCode

Replace Clear Delete Close

Next, we drag and drop the address (or addresses) we want to eliminate, down below. This makes the Replace button bold so we can click it to remove the unwanted addresses.



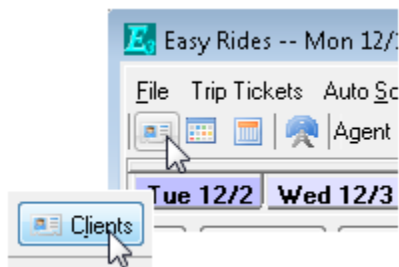
Correcting Addresses See Also

Do not simply delete a misspelled location or incorrect address. If there is already a ride request or archived ride in the system associated to the incorrect spelling or address and you delete it, all tickets with that spelling or address will have a blank in the address field. This is an undesirable outcome and can lead to errors in reporting.

Client Addresses See Also

To speed the process of scheduling trips, information about riders is input into the computer prior to scheduling a trip for a client.

To add information about a client, select one of the "Clients" buttons.



When systems are first starting out, some information about clients may not be readily available. It's best to collect information on clients and input it as part of the initial set-up process. To assist you, Mobilitat has developed a Customer Information Sheet that includes the key fields that need to be completed for each rider. Please see the "Customer Information Sheet" and adapt it to best meet your needs. There are some blank spaces on the document that enable you to customize it for your system. Please make sure that you include your system's name and phone number before reproducing the form and providing it to customers riding the bus.

If you already maintain a computerized complete customer list, it may be possible to convert that data into a format that can be used by Easy Rides. Please contact our office at 888-806-6595 to determine if that is feasible.

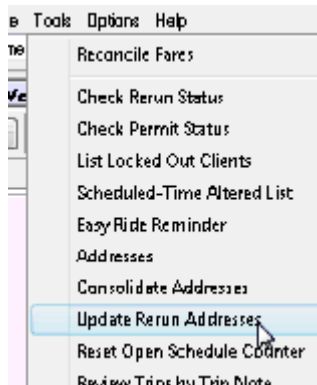
Important Client Fields

Each client needs to have their information completely filled out including name, address, birth date (the client's age is automatically calculated by EasyRides), notations on special needs (if any), ethnicity, gender etc. This data needs to be added to the database before trips are scheduled for that individual. The birth date and special needs and disability status are especially important to accurately input. This information is translated into icons that appear

Update Rerun Addresses See Also

Every address in the database is assigned a unique number. Both the address and the number are stored with the Rerun (Subscription) information. If you edit or consolidate addresses, you also need to update these unique addresses numbers by running the "Update Rerun Addresses".

First from the dispatch board, select Tools, then Update Rerun Addresses.



The computer will then review all subscription and upcoming trips and correct any data to reflect the changes you had identified.

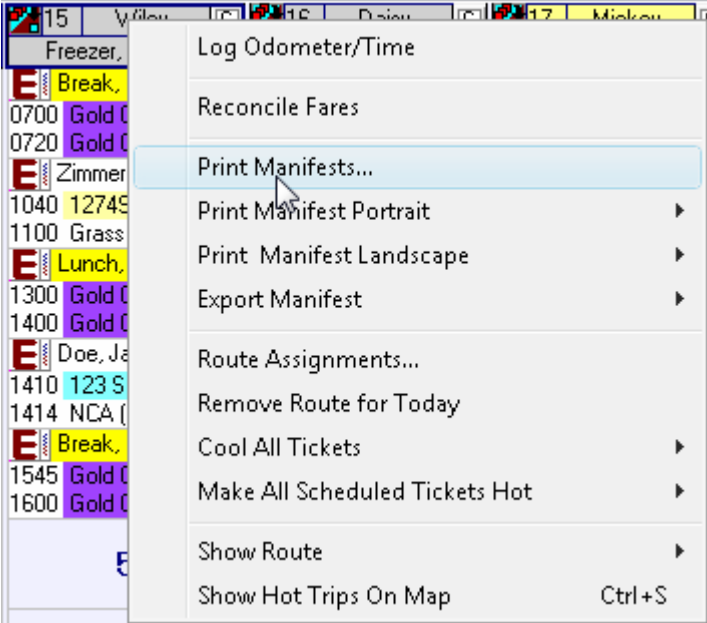
Deleting Addresses See Also

Do not simply delete a misspelled location or incorrect address. If there is already a ride request or archived ride in the system associated to the incorrect spelling or address and you delete it, all tickets with that spelling or address will have a blank in the address field. This is an undesirable outcome and can lead to errors in reporting.

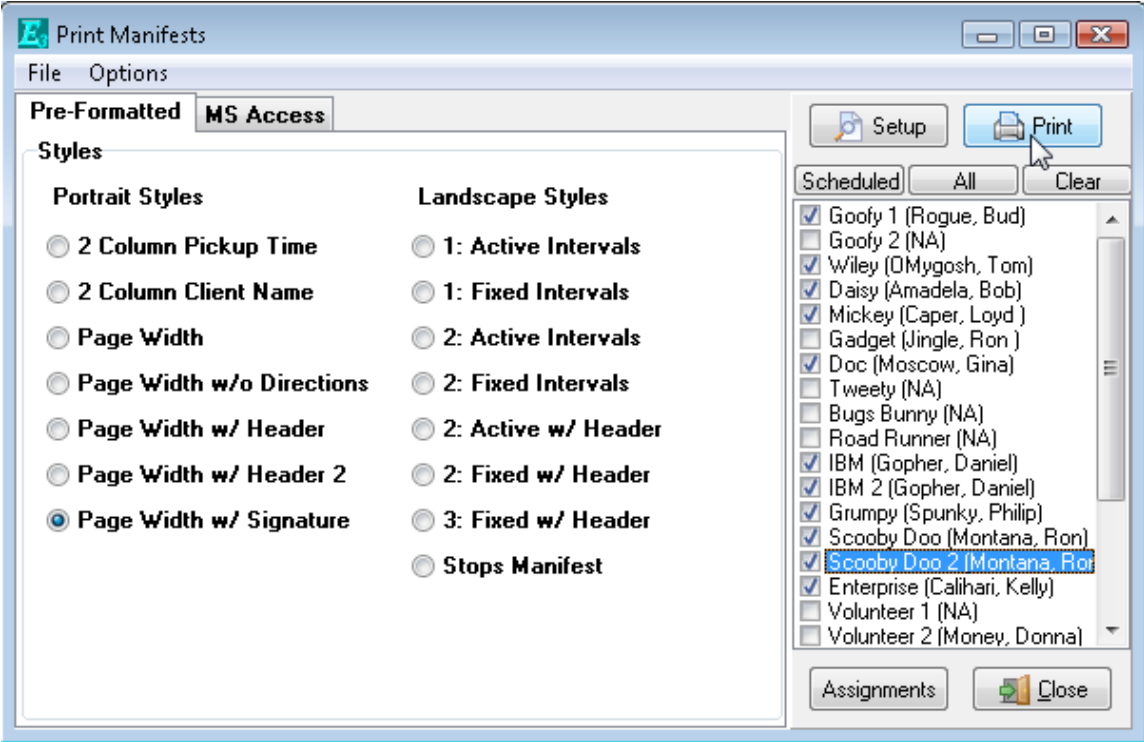
Drivers and Personnel

Driver Manifests See Also

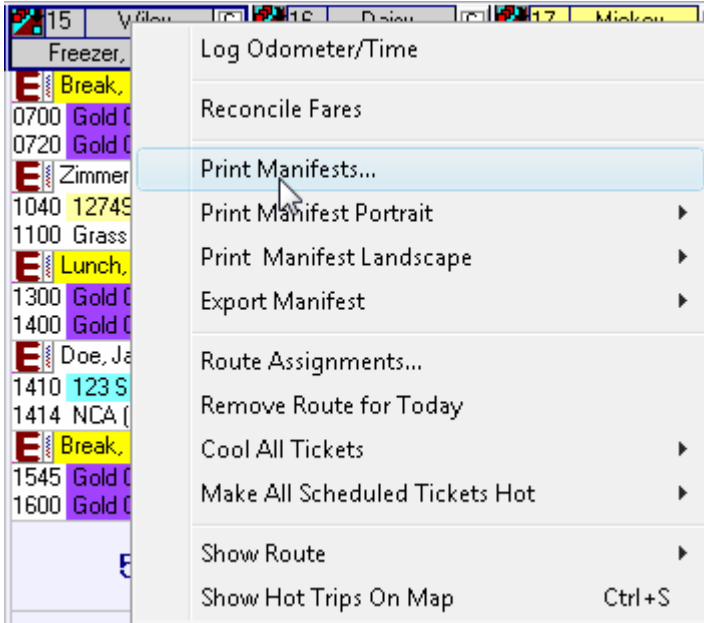
There are multiple format options for driver's route sheets, commonly called manifests. Easy Rides has at least 14 different designs of driver manifests already programmed. There is also the capacity to design your own driver manifest using MS Access. To access the Driver Manifests, open the Dispatch Board, then Right Click on a Route heading, and Select Print Manifests. This opens the Print Manifests window.



- Select the Pre-Formatted tab.
- Choose the type of manifest you want printed.
- Select the driver(s) you want to print manifests for.
- Click the Print button.



Easy Rides remembers the most recent selection of manifest that you made. Once you decide the type of format that you will use, you will only have to select the format once, unless you choose to change manifest type you are using. Using the option that says "Print Manifests..." is the best option if you are going to print manifest for more then one route.



The choices of Print Manifest Portrait or Print Manifest Landscape allow you to print the manifest for only one driver at a time.

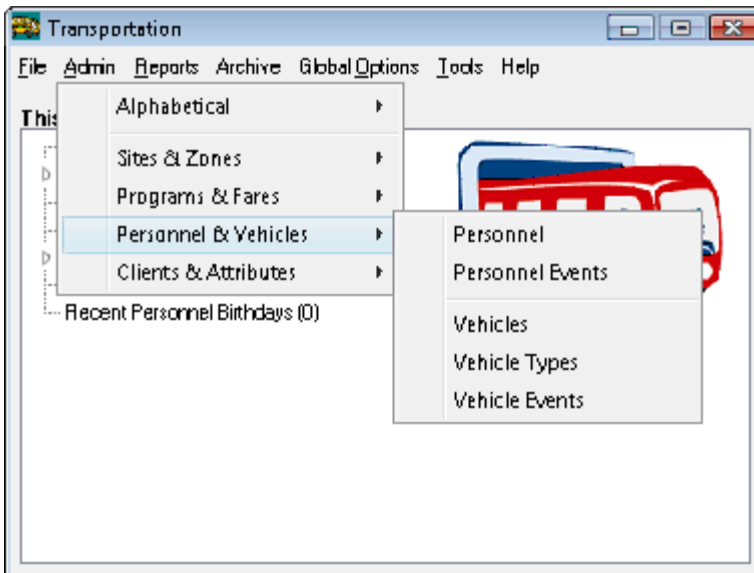
It is also possible to export manifests to other formats including MS Access, Rich Text Format, and Tab delimited format. This would enable you to produce customized manifests, send manifests via e-mail or manipulate manifests in other ways.

Personnel Qualifications and Events See Also

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:

From Easy Rides Utilities:

Click on Admin, Personnel & Vehicles then Personnel Events.

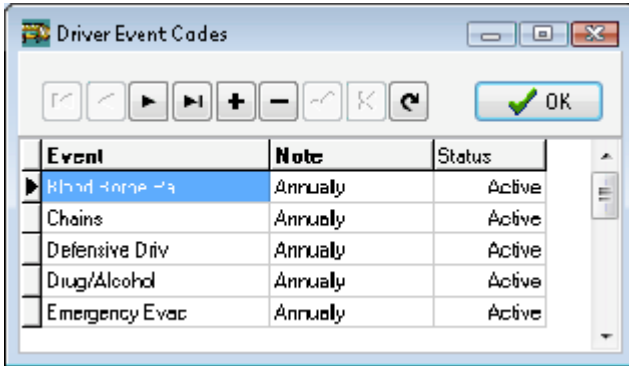


Qualifications will need to be tailored to each system's unique needs. An event is defined as the date when documentation for a driver needs to be in the office. For example:

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
 Below is a screen shot of event 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.

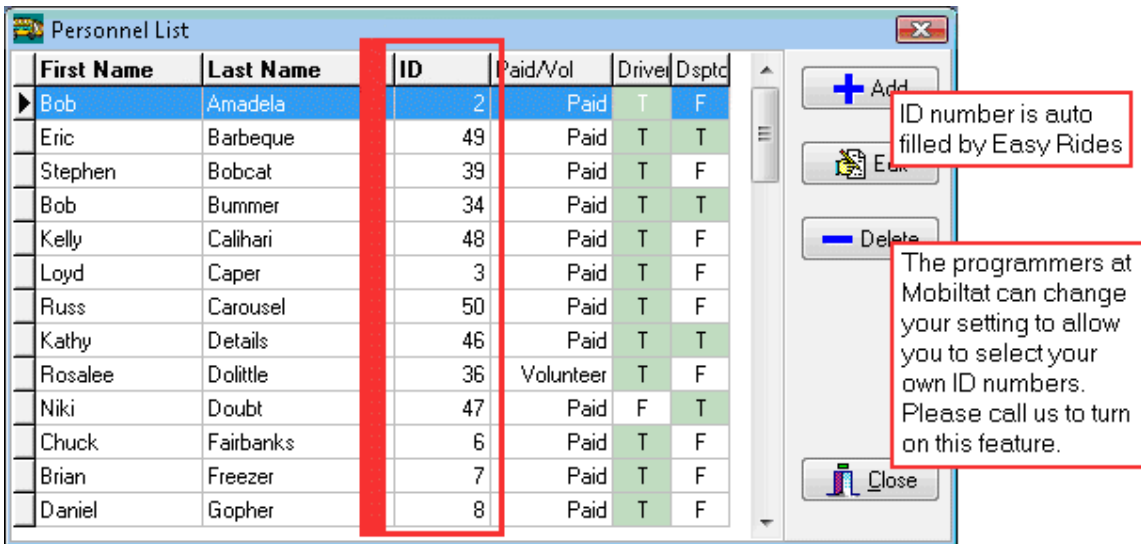
For example, once you have proof that the driver has renewed the CDL, you need to put a date in the person’s record that will show when the CDL renewal is next required.

Adding Personnel See Also

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.

To access this feature:

From Easy Rides Utilities, 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

The Personnel record (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, they will choose their name on the Dispatch Center. Activities performed by this person on trip tickets will be recorded for future reference.

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.

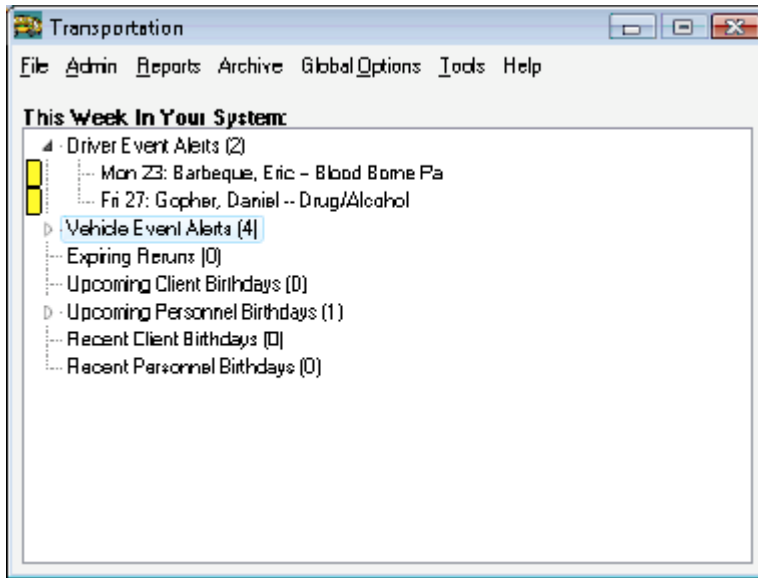
Personnel Qualifications

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 below) until the dates for the event are changed.

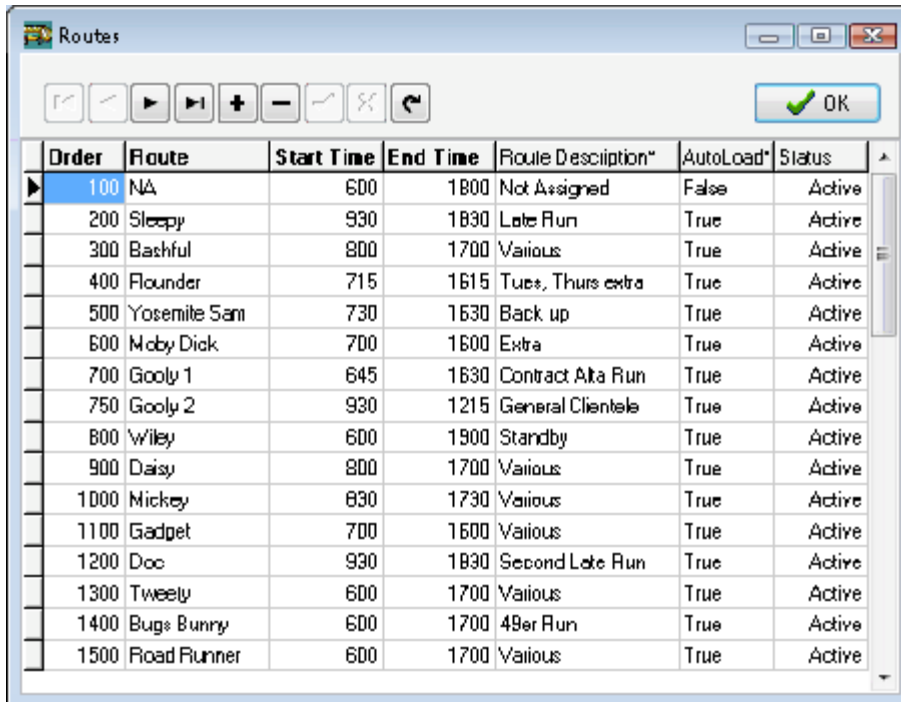


Routes See Also

To Easy Rides, a Route is a set of trips. That set of trips can be assigned to any bus and driver. You should avoid naming a route after a bus, in case that bus becomes unavailable. You should also avoid using names for Routes that describe the route service area, in case the route evolves over time. Routes should be given abstract names such as sports teams, fictional characters, music groups etc. This will make changing routes, buses and drivers less confusing by avoiding conflicting names.

To Set up Routes

From the Easy Rides Utility, click on Admin, Programs & Fares then Routes.



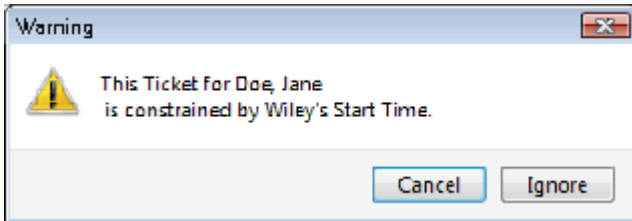
“NA” should always be the first item in the Route Table.

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

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

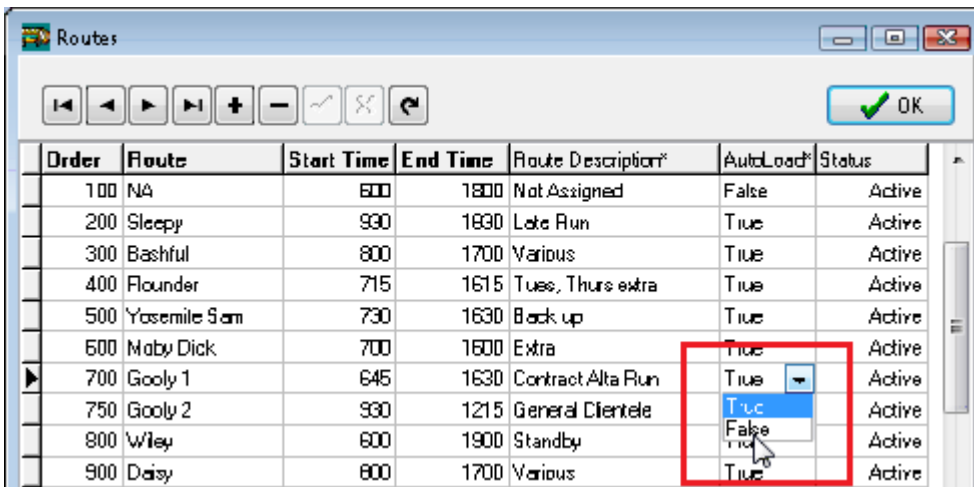
Each Route must have a start and end time. Routes can be given a min of 1, representing one minute after midnight to a maximum of 23:59, representing one minute to midnight.

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.



Route 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.



Vehicles

NOTE: We use the words “Vehicle”- and “Bus” are used interchangeably here.

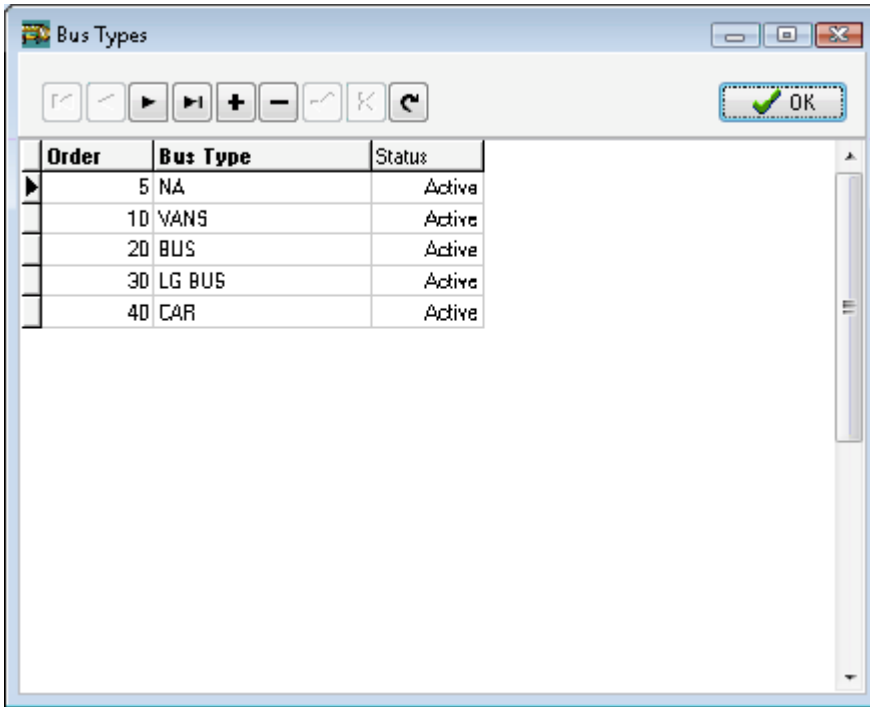
Easy Rides associates buses with drivers and trips. One of the important features of the software is the inclusion of cross checks of the data that insure a scheduler does not assign an individual to a bus that is inappropriate for that individual. For example, a warning message will display if a rider,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

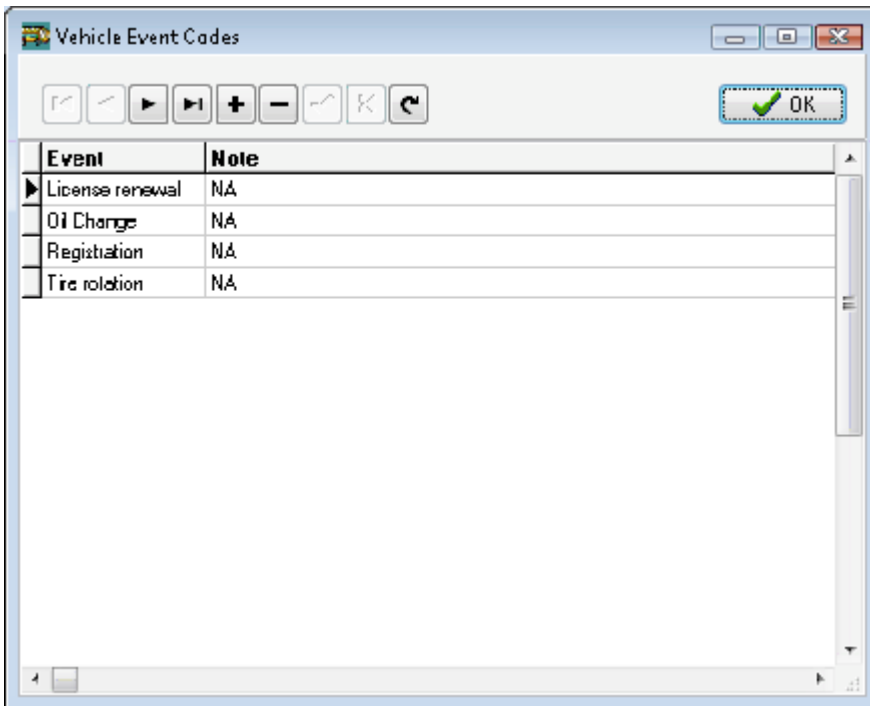
To Enter Data about Buses

From the Easy Rides Utility, 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, then enter all the vehicle events you want to keep track of.



When your vehicle events are entered, 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	01 Ford Supreme	Active
3	10	01 Ford Supreme	Active
6	15	97 Ford E-350	Active
8	20	99 Ford E-350	Active
9	25	00 Chevy Senator	Active
14	30	03 Ford Aero Tech	Active
15	35	02 Ford Aero Tech	Active
16	40	03 Ford Aero Tech	Active
17	45	03 Ford Aero Tech	Active
18	50	03 Ford E-350	Active
19	55	03 Ford E-350	Active
20	60	03 Ford E-350	Active
21	65	98 Chevy SV	Active
22	70	05 Ford E-350	Active
23	75	05 Chevy E-350	Active
24	80	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

Vehicle Record

Vehicle Name: Ford Sierra | ID #: 2 | Ord: 5 | Date Acquired: 09/01/2007 | Date Disposed: 01/01/1901

General | Events

Capacity
 Seats: Max 8, Min 3 | W/Chairs: 3, 1

Fuel
 MPG: -1 | Cap.: 20

Status: Active | **License**: UCMEGO

Bus Type: BUS | **VIN**: 12345

Available Date: 01/01/1901

Seats/Tie-Down: 1 | **Max Passengers**: -1

Note: NA

OK | Cancel

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. Also note that 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.

Vehicle Record

Vehicle Name: Ford Sierra | ID #: 2 | Ord: 5 | Date Acquired: 09/01/2007 | Date Disposed: 01/01/1901

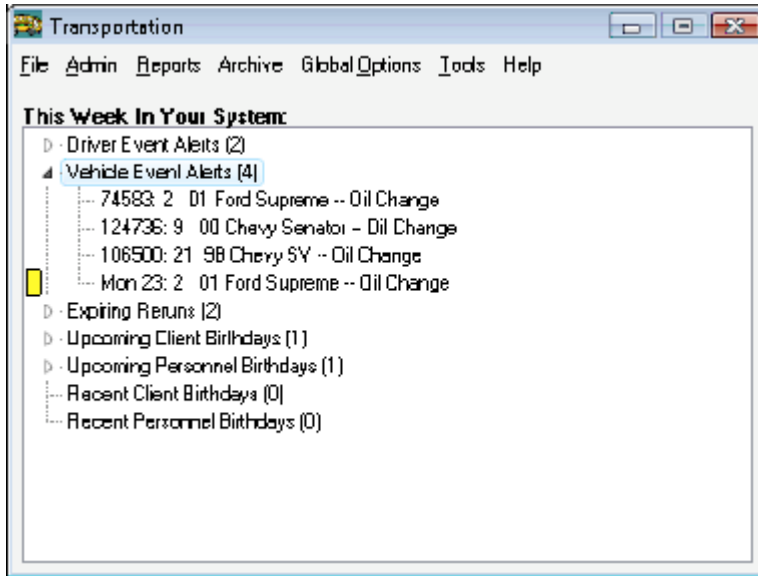
General | **Events**

Event	Event Date	Expiration Date	Alert Date
Oil Change	01/22/2008	02/23/2009	02/16/2009

Add | Edit | Delete

OK | Cancel

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.



Easy Rides User Security

Easy Rides 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.

Reimbursement

Funders

Funders are agencies, organization and individuals who fund each ride. Funders are accessed through Easy Rides Utility Software. Descriptive information about each Funder 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 contract renewals are upcoming.

To Enter Data on Funders:

Enter Easy Rides Utilities then Click on Admin, Programs & Fares then Funders. 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. 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	American Cancer 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	GY Care Center	Bill GY Care Center
20	Health for All	Health for All
20	Highgate	Highgate Senior Living

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.

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

We 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 below 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.

Order	Fare Type	Status
5	REQUIRED	Active
10	NA	Active
20	Cash	Active
20	CA Vouchers	Active
20	Direct Bill	Active
20	Office	Active
20	Ticket	Active
20	Pass	Active
20	Punch Card	Active

Rate Types

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
	REQUIRED	0	0	Active
5	NA	0	0	Active
10	Service Area	2	0	Active
20	Non-Service Area	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

Providers

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

You add Providers in the Easy Rides Utilities. Click on Admin, Programs & Fares then Providers.

Order	Provider	Rate Type	Description
5	Telecare	NA	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

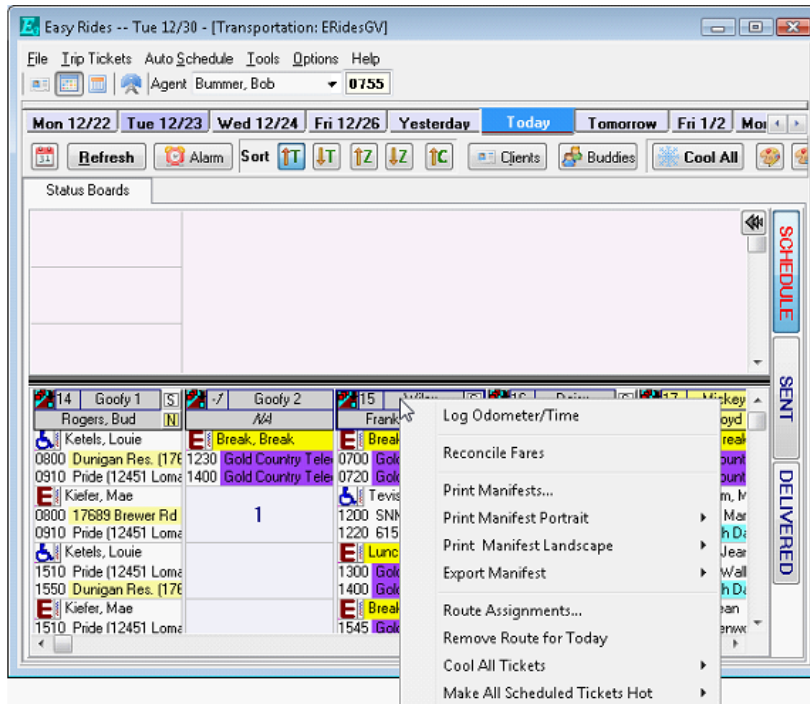
Volunteer Providers are also included in this table if they provide transportation documented by your system. Frequently volunteers are reimbursed on miles driven and they too need to be set up in both the provider table and rate table to assure that they can be properly reimbursed.

Vehicles and Routes

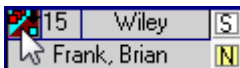
Route Assignments See Also

Day Schedules are a way to group tickets together under a route heading before you know precisely which vehicle and driver will be assigned to transport the group. Most systems complete their Day Schedules the day before trips are run. They assign drivers to routes and print manifests, so that drivers have the list of clients that they will be picking up the next day. Before manifests are printed, drivers and vehicles need to be assigned. You will also need to assign vehicles before the auto-scheduling functions become available.

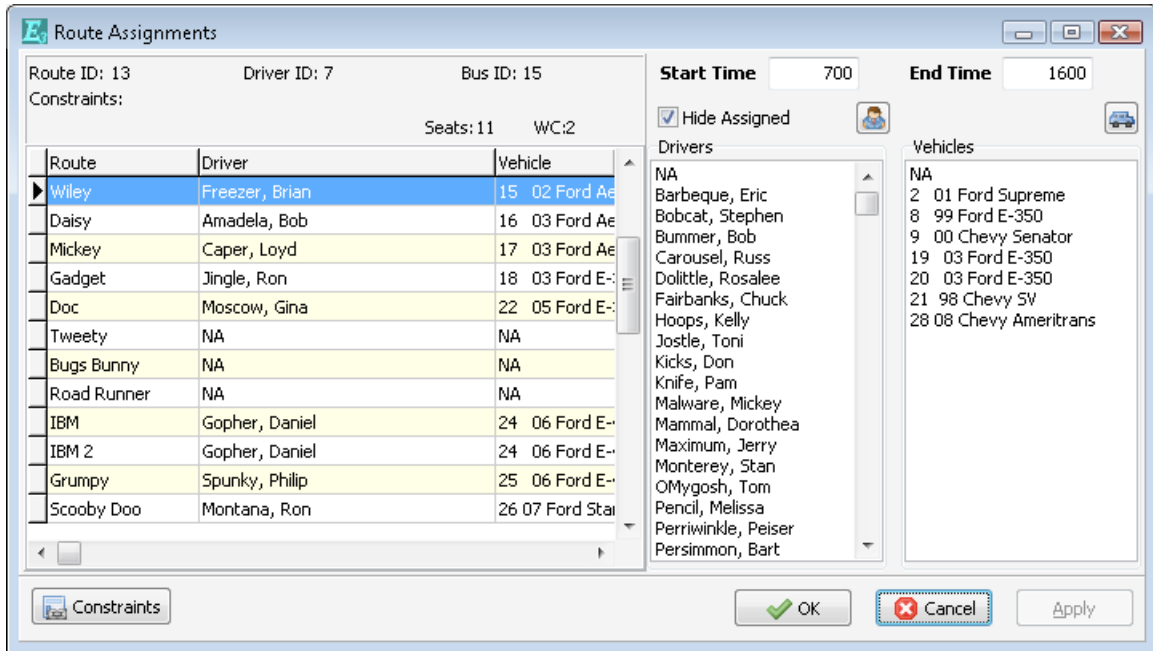
Route





Right clicking on the Route Bar displays a menu but some of the items have been placed right on the Route Bar for easy access.



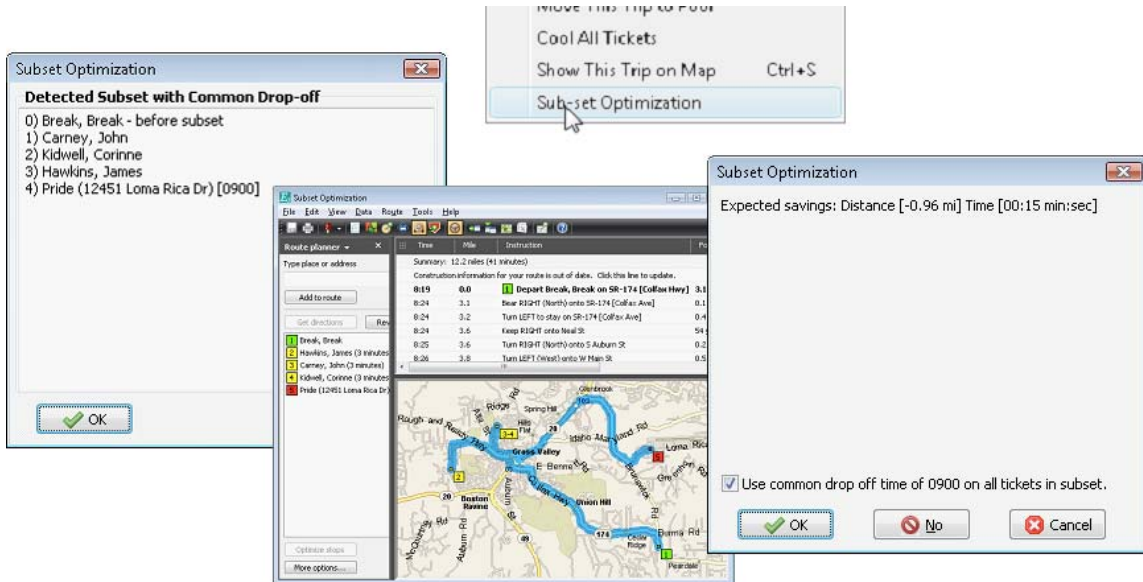
Clicking the icon in a route field opens a form where you can easily view and make changes to your route assignments. As drivers and vehicles are selected, the lists on the right reflect those still available. Those selected on the left show red text until clicking Apply at the bottom. Removing the checkmark from 'Hide Assigned' reveals the entire lists of drivers and vehicles in the event drivers and/or vehicles need to be scheduled to run a morning and afternoon route.



Ellipsis buttons   have been included to allow users to click and view driver and vehicle assignments the way they were displayed in the original forms.

Sub-set Optimization

Sub-set Optimization optimizes tickets with a common pick-up or drop-off within a route and displays the best route in MS MapPoint. Right click a ticket and if Easy Rides detects other tickets in the route with a common drop-off or pick-up address, it will offer the subset optimization menu item.



End Service See Also

Selecting the S – Revenue Service, N – Non Revenue Service or E – End Service buttons displays a form to log the odometer readings and time for beginning and ending service, breaks, etc.

Farebox Revenue

In Service See Also

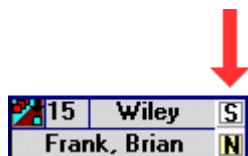
Revenue and Non-Revenue See Also

As each driver leaves the lot, they'll call in their beginning mileage to us on the radio and we'll Log the Route in Service. Notice that the routes that are "dead heading" to their first pickup are shaded yellow, the ones in revenue service are shaded white and the one not yet in service is grey.

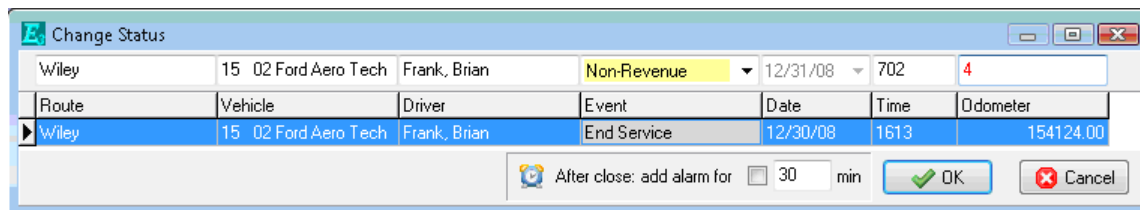
Logging Odometer and Time See Also Watch the Video

Change Status buttons exist only on the current days schedule. Selecting the S – Revenue Service, N – Non Revenue Service or E – End Service buttons displays a form to log the odometer readings and time for beginning and ending service, breaks, etc. It also provides a convenient alarm to notify you when it is time for a driver's break and when the break should be over. Because time/odometer data is used in reports and in billing, it's important to enter the updated time and odometer reading. The colors on the route columns on the Dispatch Board correspond to the latest record in the Vehicle/Odometer Log. White indicates that the route is in service, yellow means the route is in non-revenue service, and grey indicates that the route/vehicle/driver has Ended Service.

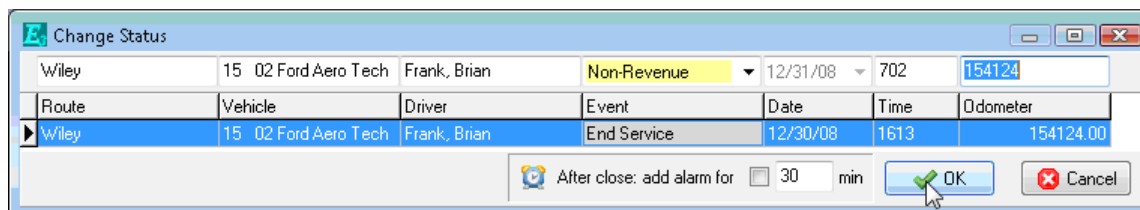
At the start of the day, each route should already be in End Service (Gray) status from the previous day. In this status, only S – Revenue Service and N – Non Revenue Service are available as choices.



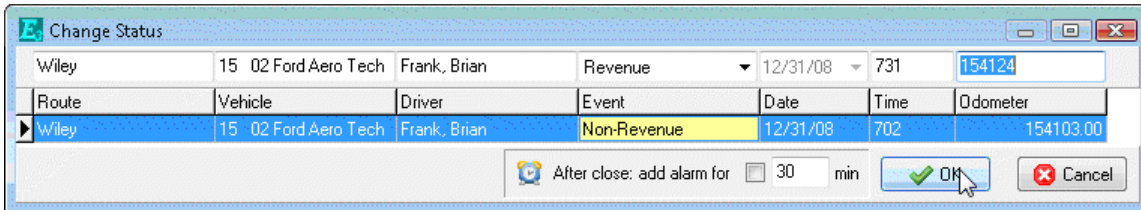
The drive to pick up the first passenger would typically be considered Non-Revenue as would be the case anytime a passenger is not on board the vehicle although some agencies choose to keep records differently. The driver would radio in to report the departure. We select N – Non Revenue. The time is automatically entered so all we have to add is the mileage which in this case should be the same as the ending mileage from the previous day. Rather than entering the entire odometer number, we can enter the last few digits and press the space bar on the computer keyboard.



Then click OK. The route is now yellow.



The driver radios in to report picking up the first passenger. We click the S – Revenue Service button. The time is automatically entered again. We enter the last few digits of the odometer, press the space bar and click the OK button.



When the driver goes to break or lunch you would select N – Non Revenue and record the odometer. You can also add an alarm to inform you when the break or lunch is over.

When the driver arrives back at the end of the day, we select E – End Service and record the final odometer number. The route changes to gray to reflect End service.

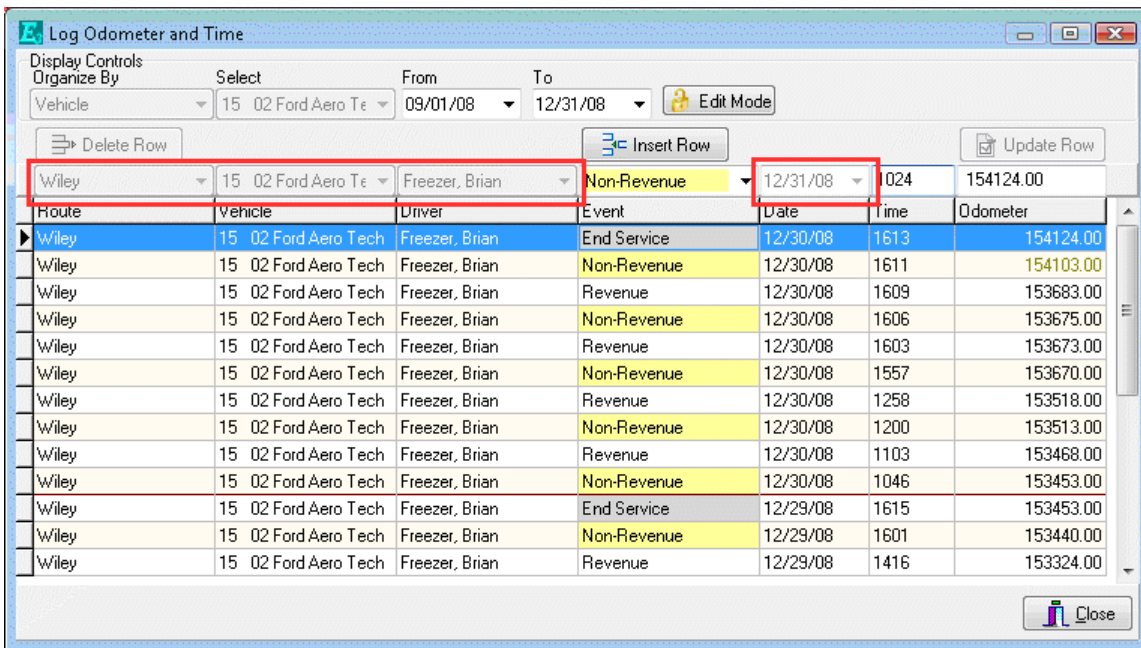
Easy Rides also watches the scheduled times for the routes and indicates with red borders and hashed status color any routes that are scheduled for a different status but haven't had an odometer status entry yet.



Logging Mileage and Time See Also

This is the alternate method to Logging Odometer and Time.

Right clicking on the Route Bar displays a popup menu. Clicking on Log Odometer/Time in that menu displays the form shown below.



This screen will allow you to add mileage and time entries as your driver begins his day, goes to lunch, ends his day, or as the vehicle is operating in non-revenue service. The grayed out text corresponds to the route on the dispatch board where you placed your cursor when right clicking. The Wiley Route is used in this example. When the form comes up, it shows the route, vehicle assigned (15 02 Ford Aero Tech), the driver (Brian Freezer) and the current date (12/31/08). These fields will remain gray (unless you need to edit an entry which is discussed below).

To insert a new entry: Choose the type of entry (Revenue, Non-Revenue, End Service) from the drop down. The system will default to the next logical entry. For example, the screen shows the last entry was an End Service entry on 12/30/08. The next entry should be a non-revenue entry (to begin the driver's day) so the system defaults to Non-Revenue. If this is not the entry you wish to use, simply click the drop-down box to choose another.

Next, you will enter a time. The system defaults to the computer's current time. If this is the time you wish to enter, skip to the odometer field. The system defaults to the last entered mileage. If this is correct, simply select "Insert Row" (this would be true if the last entry was End Service and you know the vehicle had not been driven since that entry date and time). If you need to enter a different mileage (ex. the driver is now going to lunch), the system is set so that you only

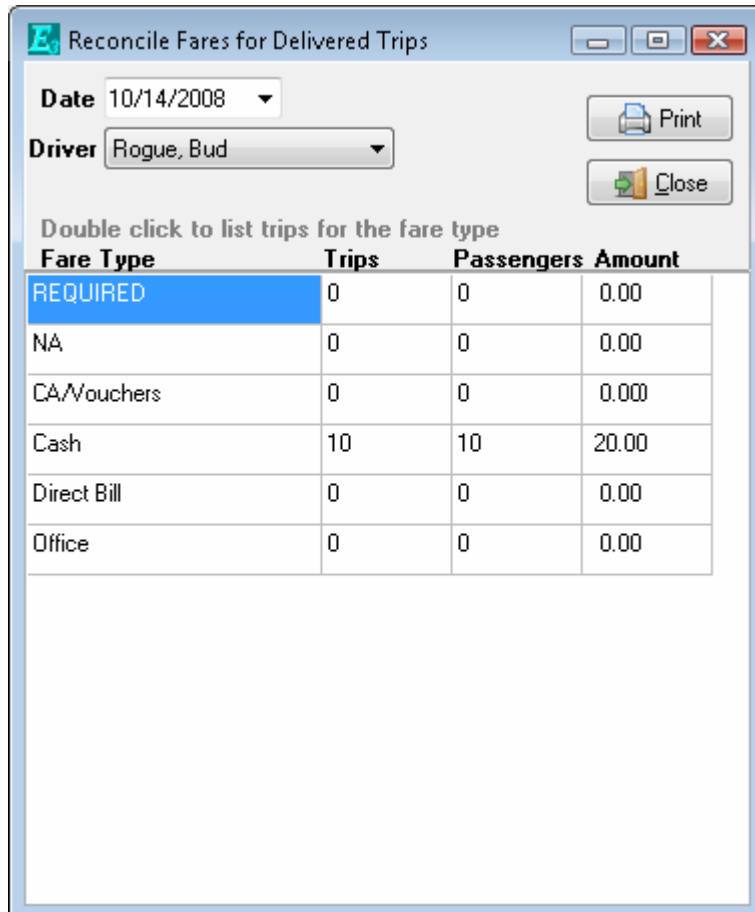
need to enter the last few numbers of the mileage, then hit the space bar. The system will automatically populate the field with the complete new mileage figure. Ex: The last mileage was 154124. Highlight the box and enter the last few digits, in this case 374. Press the space bar on the computer keyboard. The system updates the odometer field to read 154374.

To Edit an entry:

With the same screen displayed, you can click on the "Edit Mode" button and see that the fields are no longer grayed out. This allows you to correct any entries that may have been entered wrong. In the Edit Mode you can highlight the row you wish to correct. You change the information by using the drop-down boxes or by editing the time or mileage fields. When you have the correct data entered, click "Update Row". You may also remove duplicate entries by highlighting the row to be removed, then clicking on "Delete Row".

Reconciling Fares See Also

This feature allows you to reconcile the driver's farebox with expected fare amounts from the Trip tickets. To work properly all of that route 's tickets need to be accounted for by being marked as delivered, suspended, canceled, etc. Once the delivered tickets are archived the reconcile fare feature is no longer available.



After the route is completed and all of the trip tickets are cleared (delivered, canceled etc.) you may wish to reconcile the farebox of the route. To do this, right click on the desired route then click on "Reconcile Fares". A print out for the route will be provided showing the cash, tickets and other payment forms accepted by the transportation provider. From the "Reconcile Fare For Delivered Trips" you can change the Driver on the drop down list to get other driver's fare box reports. Press Print if you want to print the screen.

Other Route Options

Route Assignments (Alternate Access Method)

Selecting Route Assignments from the Route Bar menu opens the same Route Assignments window discussed previously.

Remove Route for Today

This option deletes the route from the current day schedule only. Any tickets left on the route will be marked as cancelled.

Cool All Tickets

You can also cool all tickets by clicking the “Cool All” control button or by right clicking on any ticket and selecting Cool All Tickets from the menu.

Make All Scheduled Tickets Hot

Choosing “Make Hot This Route” is useful for handling a route’s tickets all at once. For example, you could move all tickets from the scheduled to the sent board after a route’s manifest is printed.

Choosing “Make Hot All Routes” is a risky procedure. If you accidentally click in a route all trips would be moved to that one route. Whatever procedure you choose will be applied to all hot trip tickets.

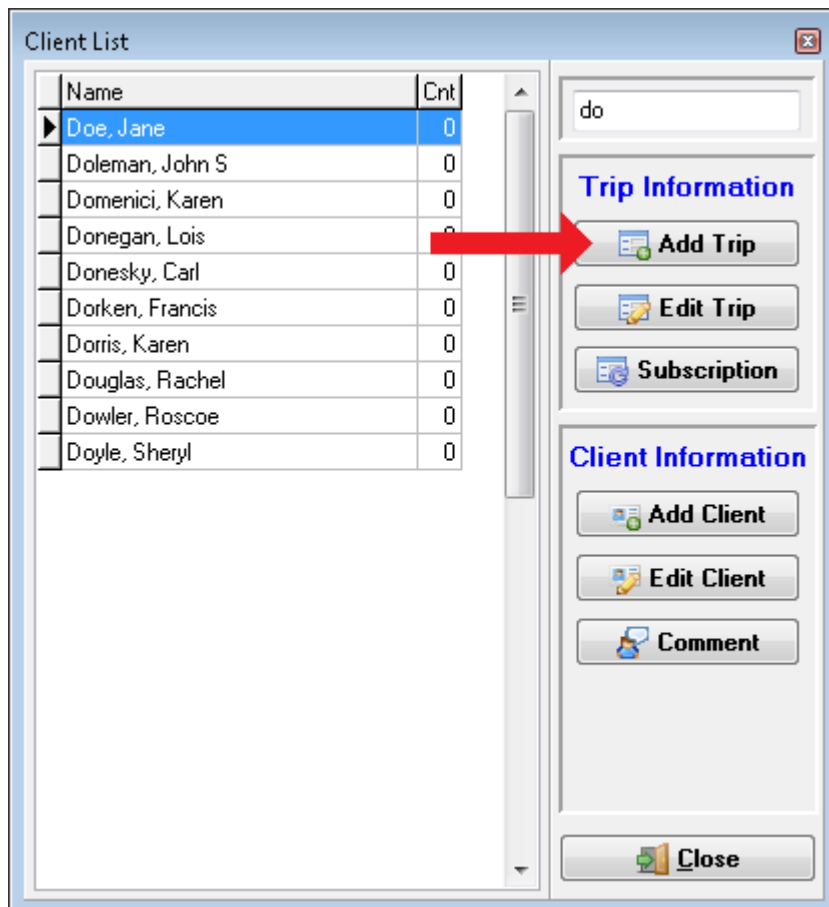
Giving Rides

Trip Tickets See Also

To add a trip ticket, select one of the “Clients” buttons. This opens the Client List window. Single click a client in the list. This will highlight the client. Click the “Add Trip” button.

Note: An alternative way of doing this is to double click on the client’s name. This too will open a new trip form.

A trip ticket will now appear on the screen. The default information from the client file is automatically entered into the Trip Ticket Form. The recent frequented address for this rider can be accessed by clicking on the down arrow in the address section.



If the client has no previous trips in Easy Rides, click on blank area of the delivery address, and a new address can be input. Begin by typing the first letters of the name of the address. The address window will open, displaying a list of matches. The default pickup address is the client’s home unless otherwise specified in the client file.

A specific route can be assigned at this time or simply leave the default of NA. That will place the trip in the pool to be assigned later.

Also note that Easy Rides provides for trips with multiple legs (e.g. home to doctor to pharmacy to home). Each leg has a separate Trip Ticket. After filling in the information for one trip, click on the “Next Leg” button to display a new Trip Ticket to schedule either the return trip or another leg of the trip.

Any fields that are **REQUIRED** need to be completed. In this instance purpose of the trip needs to be selected from the drop down menu. When the “Next Leg” button is pushed the client information included in this and other fields will populate the screen for the return trip. If an individual has more than two trips scheduled, perhaps they go to the doctor then the pharmacy, and then go home, please assure that the information that might have changed, like Purpose is properly documented.

Creating and Editing Trip Tickets See Also

A trip ticket form can be opened for editing from many different screens in Easy Rides. Once you open an existing trip you can edit anything in the trip form the same way you create a new trip. If you notice that the trip form is shaded differently than normal, check the date because it is an indication that the trip occurs in the past – this serves as a visual cue to avoid potential errors when editing a trip.

You can open a trip form from the following locations in Easy Rides:

- Edit a Trip from the Planner -- Click on a ticket placeholder in one of the timeslots of a route. Double click on the desired trip ticket.
- Edit a Trip from the Schedule (Dispatch) Board -- Single click on the desired trip ticket.
- Find a Trip – From the Schedule Board either use the keyboard shortcut {Ctrl}+{f} or click on the menu item “Trip Tickets” then “Find a Trip”. Locate and double click the desired trip. Either of these methods will open the “Edit Trip” form. You can make any changes to the trip ticket the same way you create a trip.
- Edit Trips from the Client List -- Open the Client list. Locate the desired Client and click once on the name. With the client selected, click on the “Edit Trip” button. This will open a new window with a list of the Client’s “Scheduled and Standing Trips” and “Long-Term Reruns” – you will see that it is divided in two sections:

Trip Tickets for Doe, Jane 4

SCHEDULED AND STANDING TRIPS

Date	Ticket	TripID	Route/Status
Friday Dec 19, 2008	Doe, Jane 1410 123 Sesame St 1414 NCA (200 Litton Dr.)	160830	Wiley SCHED
Monday Dec 22, 2008	Doe, Jane 1410 123 Sesame St 1414 NCA (200 Litton Dr.)	160831	Wiley SCHED
Wednesday Dec 24, 2008	Doe, Jane 1410 123 Sesame St 1414 NCA (200 Litton Dr.)	160832	Wiley SCHED
Friday Dec 26, 2008	Doe, Jane 1410 123 Sesame St 1414 NCA (200 Litton Dr.)	160833	Wiley SCHED

LONG-TERM RERUNS Show Deleted 1

Date Range	Ticket	Days	Route
12/19/2008 03/19/2009	Doe, Jane 1410 123 Sesame St 1414 NCA (200 Litton Dr.)	S M T W R F S X F T F T F T F	Wiley

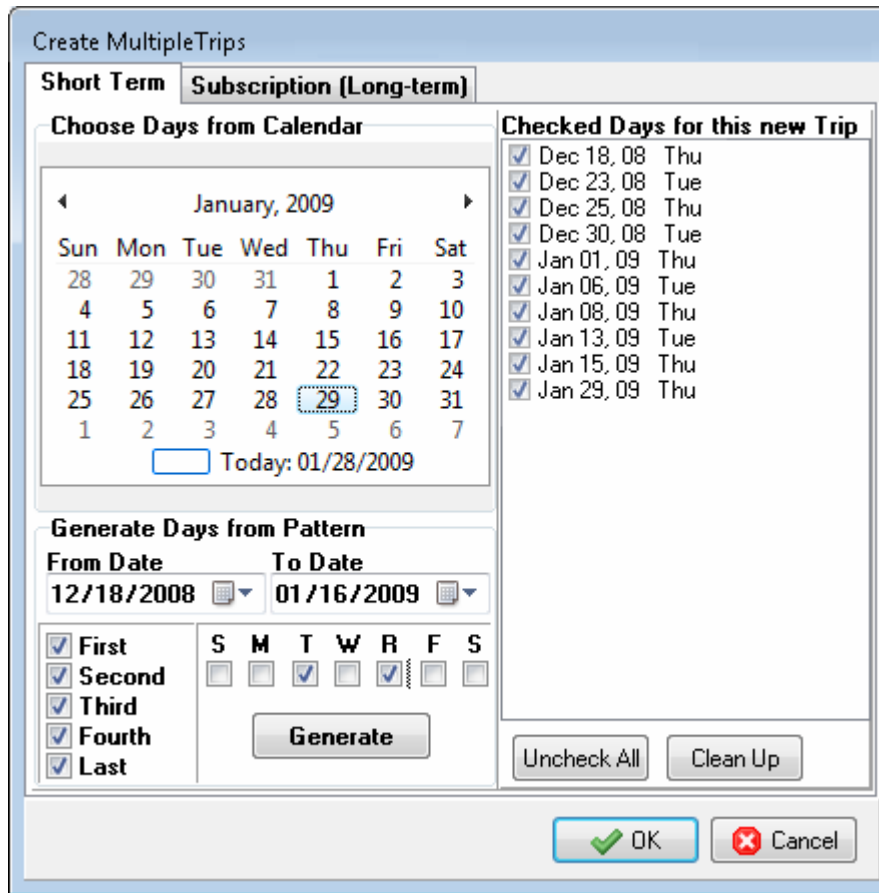
1) Scheduled and Regular Trips

The top part lists all of the trip tickets that have been created for the client either individually, from the Short Term Reruns, or when a day schedule has been created matching the conditions of a Long-Term Rerun. It shows name, date, time, pickup and delivery address, route, status and trip ID of each trip ticket. Remember that if a client has "a trip" going from home to the grocery store then back to home, there will actually be two trip tickets in Easy Rides (one for each leg of the trip). To edit a regular trip from this section, double click on the desired trip ticket and the "Edit Trip" form will open where you can make any changes.

2) Long-Term Reruns (Subscriptions)

Subscriptions (also referred to as "Long-Term Reruns") are templates that Easy Rides uses to create trips when a matching day schedule is created and are shown at the bottom portion of the "Trips for this Client" window. The Long Term Rerun List can also be displayed by clicking on the Trip Tickets -> List Rerun Trips item in the Main Menu. Rerun Subscriptions for all clients will be listed when the Long Term Rerun List is entered from the Main Menu.

To edit the subscription (Long-Term Rerun) – double click on the desired leg or Rerun. This opens the "Edit Rerun Trip" form which looks similar to the regular trip form except it has the "From Date", "To Date", weeks and the days of the week checkboxes at the bottom of the form.



To delete a subscription, click once on a trip leg and then click the “Delete Rerun” button. Repeat this for each leg to be deleted.

Occasionally, a client doesn’t want their regularly scheduled ride on a certain day(s) – to easily prevent those trips from being created by Easy Rides, use the Suppress Rerun feature.

To Suppress a Rerun

There are two ways to access this. The first is to select a client in the Client List and click Edit Trip. This opens a list of the client’s trip tickets. Click the desired long term rerun to high light it, then click the “Suppress Rerun” button to display the “Suppress Rerun Subscription Trips” window. The second is to click the Trip Tickets menu item, select “List Rerun Trips” and search for the desired client name. From there, click the rerun to high light it then click the “Supress” button. Next, double click the days on the calendar the client wishes to cancel, then click OK. If the client should change their mind and want the trips after all, access the “Suppress Rerun Subscription Trips” window again and uncheck the listed Suppressed days and those trips will again be created (unless the day schedule has already been created). It’s important to remember this for each day schedule created the trip tickets for that day have also been created from the Subscription template (Long-Term Reruns) and are now independent and must be edited or modified individually in the Regular Trip section. “Suppress Rerun” only works on days that have not yet been created.

Suppress Rerun Subscription Trips

Dates

January, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 12/19/2008

Suppress on Checked Days

Dec 31, 08 Wed

Jan 02, 09 Fri

Reruns **Pickup**

Save list for another Rerun

If you cancel, no show or delete a trip ticket and the Client has other trip tickets for that day, Easy Rides will prompt you to apply the same (cancel, no show or delete) to the other trip tickets for that day. If you wish to also do the same for the other trips, check the box next to the appropriate leg (trip). If you do not, then leave the checkbox cleared. Once you decide whether or not to include the other trips click the "OK" button.

Client Has Other Trips

**On Wednesday, January 21,
Reynolds, Amy
also has the following trips.**

Trips in effected groups.

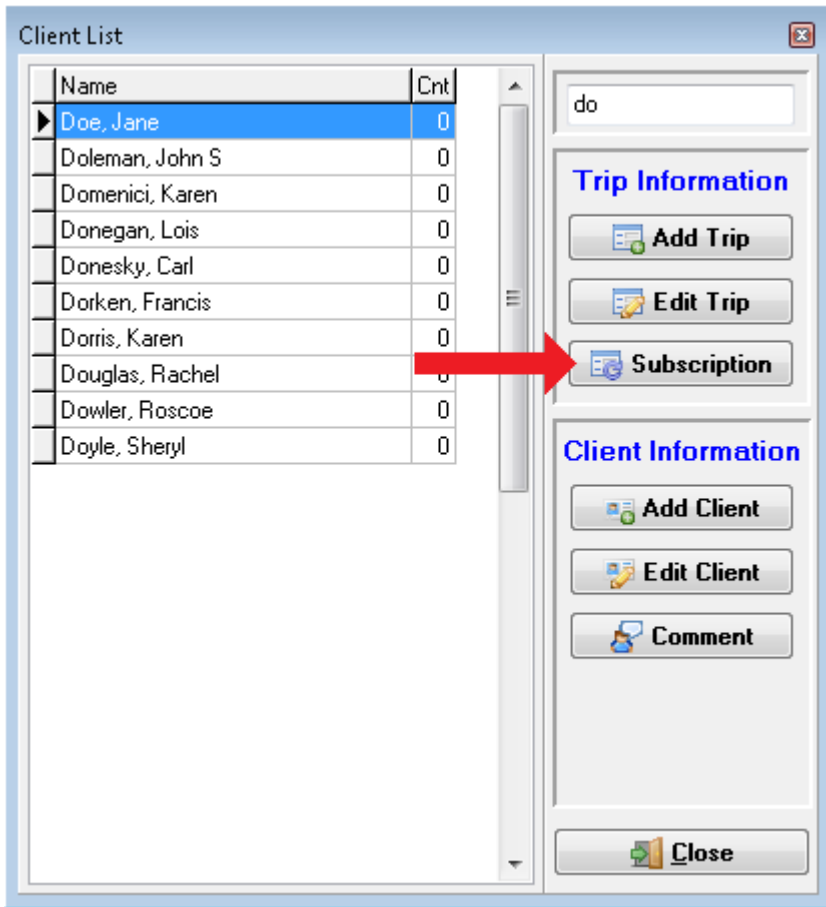
Reynolds, Marjorie :: 0800 [17689 Brewer Rd]

Mark with a check any other trips that should also be moved.

Then refresh dispatch boards.

Subscription Trips See Also

Easy Rides provides for two types of Subscription (Rerun) Trips: "Short Term" and "Long Term". Short Term Reruns are trips that will be repeated on a regular basis for a reasonably short period of time - up to 90 days. This is also where you will create subscriptions for the odd schedule (e.g. every other Wed). Creating a Short Term Subscription is like using a copy machine in the sense that Easy Rides will immediately create copies of a trip that you want to repeat on the days you specify. Upon completion of creating a short term subscription, the tickets become independent of each other and are then listed in the regular trip section of the Client's "Edit Trip" screen.



Creating a Long Term Subscription is more like creating a template in Easy Rides used to generate trips when day schedules are created matching the conditions (days) of the long term subscription template.

Short Term Subscriptions (Reruns)

Clicking the “Subscription” button on the Client List Form and then the “Short Term” tab will display the Short Term Rerun Form. Within this Short Term form there are two methods:

“Regular Trips” – which is to enter the From Date and the To Date for the period that the Trip Tickets are to be generated (the maximum period is 90 days) then check the days of the week for each trip. After setting the From Date, To Date, selecting the desired weeks and checking the days, click on the Create Trips button and a list of the trips will be shown on the right.

Create MultipleTrips

Short Term **Subscription (Long-term)**

Choose Days from Calendar

January, 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 01/28/2009

Checked Days for this new Trip

- Dec 18, 08 Thu
- Dec 23, 08 Tue
- Dec 25, 08 Thu
- Dec 30, 08 Tue
- Jan 01, 09 Thu
- Jan 06, 09 Tue
- Jan 08, 09 Thu
- Jan 13, 09 Tue
- Jan 15, 09 Thu
- Jan 29, 09 Thu

Generate Days from Pattern

From Date: 12/18/2008 To Date: 01/16/2009

First S M T W R F S
 Second
 Third
 Fourth
 Last

Generate

Uncheck All Clean Up

OK Cancel

"Special Trips" – are trips which can also be added to the list by double clicking on a date in the calendar at the top of the form.

Trip Tickets will only be generated for the dates with a check in the box. In this example, we are going to generate trip tickets for every Tuesday and Thursday from December 18 2008, to January 16, 2009 and then an additional special trip on Thursday January 29 as well. Don't worry too much about the names "Regular Trips" and "Special Trips" on this form – either method will have the same results as long as the days are checked on the right side of the screen. It should be noted that the disadvantage of using short term subscriptions is that the "Suppress Rerun Subscriptions" feature is not available because the trip tickets are generated immediately and now must be handled independently (see the section on "Editing Trips" for more detail).

Long Term Subscription Trips See Also

The Long Term Reruns feature provides you with a convenient form for creating a subscription for this trip (including all legs). Clicking on the "Subscription" button on the Client List Form will display the "Create Multiple Trips" form with the "Subscription (Long-term)" tab displayed.

The screenshot shows a dialog box titled "Create Multiple Trips" with two tabs: "Short Term" and "Subscription (Long-term)". The "Subscription (Long-term)" tab is active and highlighted with a red border. Below the tabs is a "Repeat Trip Schedule" section. It includes "From Date" (12/19/2008) and "To Date" (03/19/2009) fields, with "89 Days" indicated. Below these are five rows of checkboxes for "First", "Second", "Third", "Fourth", and "Last" trips. The "Second" trip is defined by the days S, M, T, W, R, F, and S. The "Third" trip is defined by M, W, and F. The "Fourth" trip is also defined by M, W, and F. The "Last" trip is defined by all days. At the bottom of the dialog are "OK" and "Cancel" buttons.

A subscription will be created to generate Trip Tickets for each week and day that is checked during the period specified in the From Date and To Date fields. Trip Tickets are not actually generated until a New Day Schedule is created matching the subscription's checked days.

Clicking on the "OK" button from the "Subscription (Long-term)" tab will display the New Trip Ticket Form for entering the details and any subsequent legs – from this point, the process is the same as creating a regular trip – see the chapter on "Creating a Trip" for more details on that. Trip Tickets will not be generated until the OK button is clicked on the Trip Ticket Form. Once you click the "OK" button, trip tickets will be created for the existing day schedules within the dates you specified. The remaining trip tickets will be created upon each matching day schedules creation.

Check Permit Status

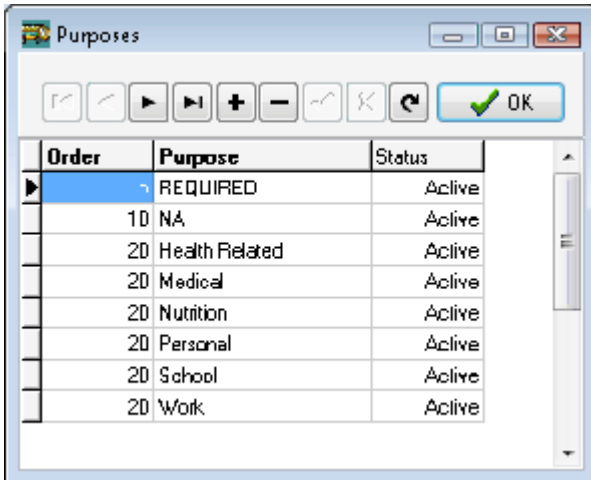
Check Permit Status is found on the Easy Rides "Tools" menu. This feature displays a list of Clients whose authorization has expired or is expiring in the number of days specified. Double clicking on a Client or selecting the Client then clicking the "Edit" button opens the Client Form for editing.

Trip 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.

To Entering Trip Purposes"

From the Easy Rides Utility, click on Admin, Programs & Fares then Purposes.



Listed above 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.

About Time for Rides

Please note that Easy Rides uses military time to document pick up and drop off times. In the sample trip above the individual is being picked up at 14:30 (or 2:30 pm) and will arrive at her destination at 15:00 (or 3:00 pm). Below is a table you can use for translating conventional time into military time:

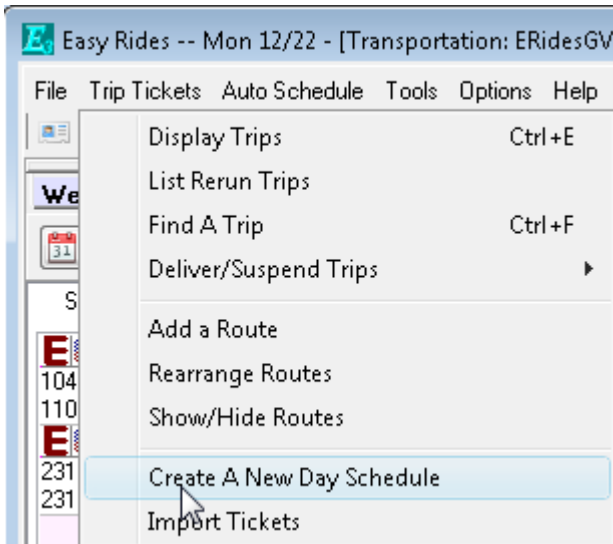
Conventional	Military
8:00 am	8:00
9:00 am	9:00
10:00 am	10:00
11:00 am	11:00
12:00 pm	12:00
1:00 pm	13:00
2:00 pm	14:00
3:00 pm	15:00
4:00 pm	16:00
5:00 pm	17:00
6:00 pm	18:00

Dispatching

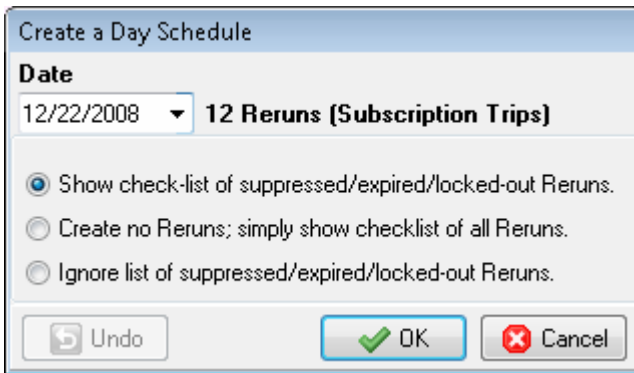
Creating a Day Schedule

Day Schedules are a way to group tickets together under a route heading before you know precisely which vehicle and driver will be assigned to transport the group. Most systems complete their Day Schedules the day before trips are run. They assign drivers to routes and print manifests, so that drivers have the list of clients that they will be picking up the next day. Before manifests are printed, you need to assign drivers and vehicles. You will also need to assign vehicles before the auto-scheduling functions become available.

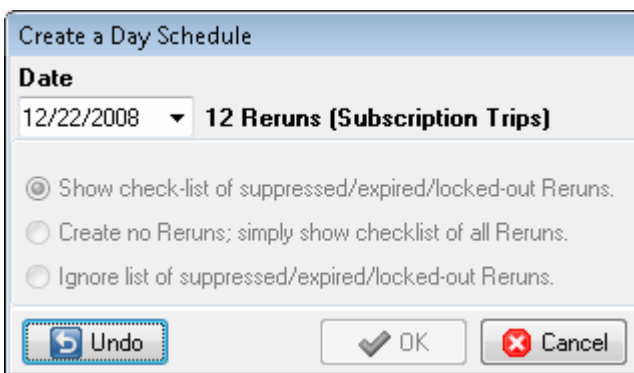
The Dispatch (Schedule) Board is where users visually interact with a specific day's trips, routes and assignments. Before we can open a day on the Dispatch Board however, we must first create a day schedule by clicking the Trip Tickets menu item and selecting "Create A New Day Schedule".



When Easy Rides opens the Create A New Day Schedule form, you will notice that it will look slightly different depending on whether the day has already been created or not. If it has not, the "OK" is active (not grayed out).



If the day HAS already been created, only the "Undo" button is active and the "OK" button is grayed out (Note – In the event the Undo button is grayed out on a previously created day, you will need to click on the Tools menu item and select "Reset Open Day Counter"). In either case, it will list how many Reruns (Subscription Trips) there are for the date selected.

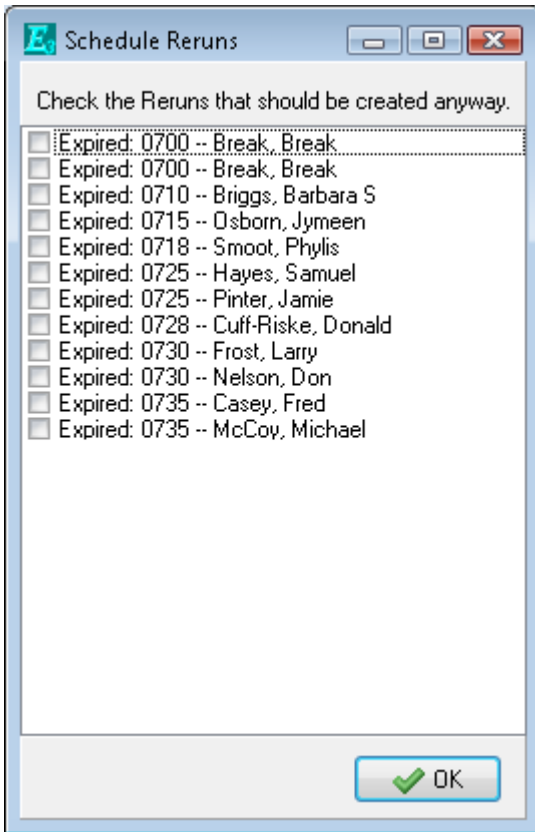


After you select the date there are 3 options to choose from, click the radio button next to the desired option and select the OK button.

Option: "Show check-list of suppressed/expired/locked- out Reruns"

Usually the most desirable option because you can see a reminder of normally occurring Reruns that are NOT going to be created on the selected date, due to expired or suppressed reruns. You may also see that you need to update a

Client's expiration status and perhaps extend their expiration date on their Subscription. When the Scheduled Reruns screen appears check the box next to any trips you wish to create regardless of the listed status then click the OK button.

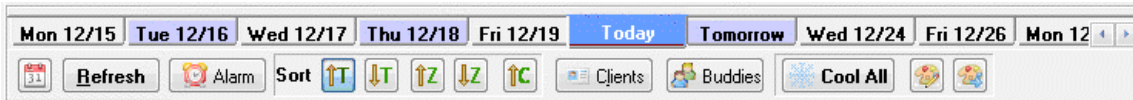


Option: "Create no Reruns; simply show checklist of all Reruns"

Useful if you wish to authorize each and every Rerun for that day, but this could be time consuming. Click the OK button.

Option: "Ignore list of suppressed/expired/locked- out Reruns"

This is the quickest method of creating a Day Schedule but also the most likely to result in errors. For example, if a Client is eligible to ride, but the system has not yet been updated, their Rerun will be listed as "Expired" and the trip ticket will not be created. Click the OK button. The Day Schedule is now created, and available on the Dispatch Board:



The Planner Board:

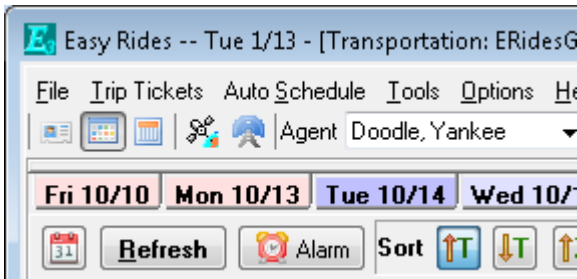
Mon 12/15	Tue 12/16	Wed 12/17	Thu 12/18	Fri 12/19	Today	Tomorrow	Wed 12/24	Fri 12/26	Mon 12	
Dec 22	Pool	Goofy 1	Goofy 2	Wiley	Daisy	Mickey	Gadget	Doc	Tweety	Bugs Bu
:30										

and via the calendar icon on the Dispatch Board (open days are indicated in bold):

Mon 12/15	Tue 12/16	Wed 12/17	Thu 12/18	Fri 12/19	Today	Tomorrow	Wed 12/24	Fri 12/26	Mon 12	
Dec 22	Pool	Goofy 1	Goofy 2	Wiley	Daisy	Mickey	Gadget	Doc	Tweety	Bugs Bu
:30										

Old Day Schedule Tabs

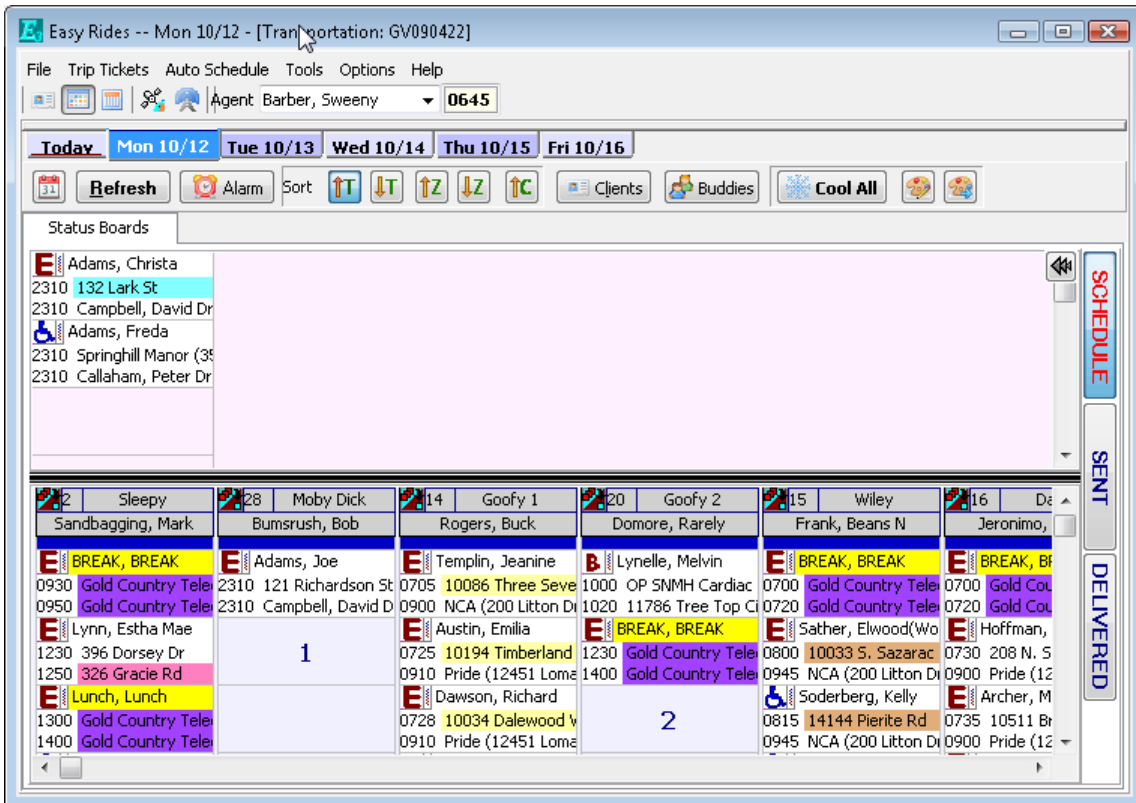
Tabs for day schedules older than 3 months show in red to help keep them from being confused with current day schedules. It is recommended old day schedules be deleted after archiving them, unless necessary.



Understanding the Dispatch Board

Once a particular day's schedule is created it can be modified, viewed and used via the Dispatch Board. Just click a day tab to open a particular day.

The Dispatch Board is below. Notice the date of the schedule you opened appears in the title bar (blue area) at the top of the screen. The schedule includes Trip Tickets for the current day. There are several sections of the schedule that have specific purposes and capacities. These are outlined below. Please note that many sections of the Dispatch Board can be adjusted both horizontally and vertically by clicking and dragging your mouse to increase the column width or the screen proportions for pool, schedule or staging area.

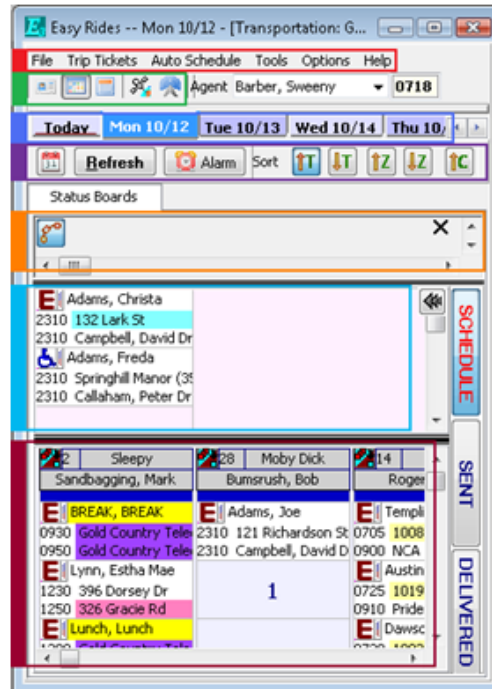


Sections of the Dispatch Status Board

Main Menu: provides access to functions like adding, editing, updating and client information. See Dispatch Board Main menu later in this chapter.

Control Buttons: provides access to the Clients, Dispatch, Planner and Message Boards. **Easy Rides Plus customers also have a MapPoint button.** See Control Buttons later in this chapter.

Day Tabs: provides access to each days schedule. Tabs for day schedules older than 3 months show in shades of red to help keep them from being confused with current days schedules. It is recommended you delete old day schedules after archiving them, unless necessary.



Speed bar: provides for refreshing the schedule after a change has been made, alarms, enabling sorting of trip tickets, quick access to client list, and accessing group tickets. See Speed Bar Section later in this chapter.

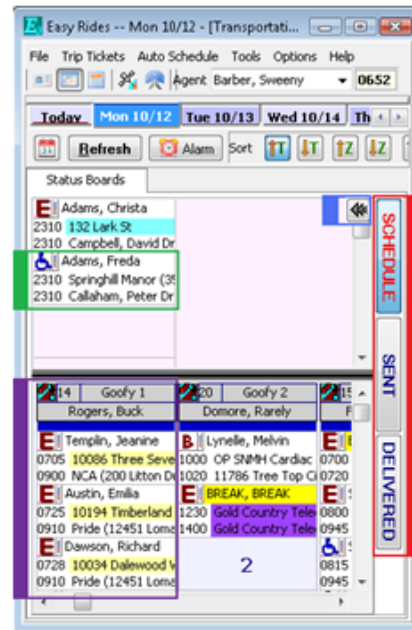
The Stage: A work space that can hold tickets until they are assigned or reassigned. Tickets can be positioned by dragging and dropping within the stage. Clicking the **X** closes the stage.

Pool: An area that contains trip tickets that have not yet been assigned to a Route/Run. Tickets in the pool can be sorted by time, zone or client name.

Schedule: This area displays the trips that have been assigned to a Route/Run. Trip Tickets are listed in the columns below the route and can be sorted by pickup time, delivery time, client name, or zones.

Additionally, colored lines are just above the top row of trip tickets on the Schedule, Sent and Delivered boards and the empty ticket grid is shaded with matching colors. These colored lines and grids offer a visual cue to which board you're looking at and when you are scrolled to the top row of tickets. The stripes disappear from view on any board when you scroll down so if you do not see a stripe, you are not scrolled to the top of that board.

A Trip Ticket: Each Trip ticket is represented on the Schedule Dispatch Board in 3 lines. It includes an icon that identifies client’s needs. In this instance the client uses a wheelchair. With the option of “Display Tickets Large” the first line has the rider’s name. The second line has the pick-up time and pick-up address. The third line has the drop off time and the drop off address. By single clicking on a specific Trip Ticket, a Trip Ticket form is opened for viewing or editing. The color combinations of the address on the Trip Ticket represent zones where the address is located. This enables a scheduler to try to group tickets together in the same geographic area. Also, trip tickets modified by another user on a different workstation appear shaded. Single clicking the shaded ticket returns it to its normal appearance to indicate you have viewed the changes.

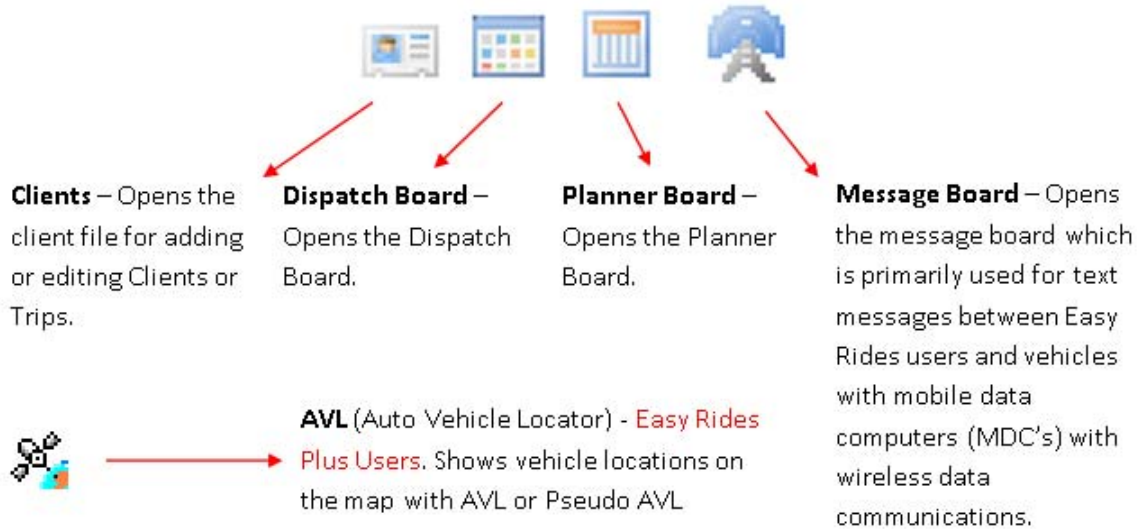









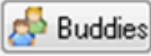



Selector Tool: Clicking the set of arrows opens the tool and allows you to easily identify trips with commonalities in a selected time range. See Selector Tool Section later in this chapter.

Schedule, Sent and Delivered Tabs: The three tabs on the right hand side of the board differentiate between Scheduled trips, Sent trips and Delivered trips. Depending on how your organization dispatches, the Sent trip board represents tickets that have been “sent” or communicated to the Driver. The Delivered Board represents tickets that have been reported by the driver as delivered. This function is especially important for systems that have mobile data terminals (MDTs) for driver schedules.

Route/Run Columns: The Route/Run bar with route name and driver name sits below the pool. A Route/Run is a column for collecting trips that will be provided by the specified driver and vehicle. Route and Run are terms used interchangeably in this document. A column for each route will include every trip that will be run by that driver/vehicle combination each day.

Control Buttons



- 
 - The “Calendar” button allows you to toggle between open schedule days. Days that have been created appear bold.
- 
 - The “Refresh” button refreshes the display using current data in the database. When more than one person is making changes to the same Day Schedule, the Refresh button is used to display the changes made by other people.
- 
 - The “Alarm” button displays the alarm dialog box. An unlimited number of alarms can be set to notify you of important events. For example, alarms can be set to notify you when a driver’s break is due and when it is over. This button flashes and an optional alarm sounds when the alarm goes off.
- 
 - The “Sort by Time” button sorts the tickets by pickup time when the arrow is up, and by delivery time when the arrow is down. The shaded square indicates the current state.
- 
 - The “Sort by Zone” button sorts the tickets by pickup zone when the arrow is up, and by delivery zone when the arrow is down. The shaded square indicates the current state.
- 
 - The “Sort by Client” button sorts the tickets by client and pickup time. The shaded square indicates the current state.
- 
 - The “Clients” button displays the Client List.
- 
 - “Buddies” (formerly “Groups”) enable trip tickets to be associated. This allows for simultaneous handling of grouped tickets.
- 
 - The “Cool All” button cools all hot tickets.
- 
 - The “Color Selector” allows users to flag selected hot tickets with a specific color (Red, Blue, Black or Green).
- 
 - The “Hot Trigger” will make hot, all tickets of a specific color.

Reruns

The Long Term Reruns (also known as Long Term Subscriptions) feature provides you with a convenient form for creating a subscription for this trip (including all legs). Clicking on the “Subscription” button on the Client List Form will display the “Create Multiple Trips” form with the “Subscription (Long-term)” tab displayed.

The screenshot shows a window titled "Create Multiple Trips" with two tabs: "Short Term" and "Subscription (Long-term)". The "Subscription (Long-term)" tab is selected and highlighted with a red box. Below the tabs is a "Repeat Trip Schedule" section. It contains two date pickers: "From Date" set to 12/19/2008 and "To Date" set to 03/19/2009, with "89 Days" indicated. Below the dates is a grid of checkboxes for days of the week (S, M, T, W, R, F, S) for five occurrences: First, Second, Third, Fourth, and Last. The "First" row has all days checked. The "Second" row has S, M, T, W, R, F, and S checked. The "Third" row has M, T, W, R, and F checked. The "Fourth" row has M, T, W, R, and F checked. The "Last" row has all days checked. At the bottom right of the window are "OK" and "Cancel" buttons.

A subscription will be created to generate Trip Tickets for each week and day that is checked during the period specified in the From Date and To Date fields. Trip Tickets are not actually generated until a New Day Schedule is created matching the subscription's checked days.

Clicking on the “OK” button from the “Subscription (Long-term)” tab will display the New Trip Ticket Form for entering the details and any subsequent legs – from this point, the process is the same as creating a regular trip – see the chapter on “Creating a Trip” for more details on that. Trip Tickets will not be generated until the OK button is clicked on the Trip Ticket Form. Once you click the “OK” button, trip tickets will be created for the existing day schedules within the dates you specified. The remaining trip tickets will be created upon each matching day schedules creation.

Telling Time While Dispatching

Easy Rides uses military time to document pick up and drop off times. In the sample trip above the individual is being picked up at 14:30 (or 2:30 pm) and will arrive at her destination at 15:00 (or 3:00 pm). Below is a table you can use for translating conventional time into military time:

Conventional	Military
8:00 am	8:00
9:00 am	9:00
10:00 am	10:00
11:00 am	11:00
12:00 pm	12:00
1:00 pm	13:00
2:00 pm	14:00
3:00 pm	15:00
4:00 pm	16:00
5:00 pm	17:00
6:00 pm	18:00

Moving Tickets See Also

Moving or handling trip tickets from the Dispatch Board (“Schedule”, “Sent” and “Delivered” Boards) is very quick and easy. The process basically involves selecting the trip tickets that you want to move by clicking once on the special needs icon in the upper left-hand corner of each ticket – this turns the background of the icon red indicating that the trip ticket is selected. This action is known as “Making Hot” the trip ticket(s). Once the desired trip ticket(s) are made “hot” the next action you perform (by menu or by holding down the {Ctrl} key on your keyboard then clicking somewhere on the screen) will affect all of the selected tickets. You can also “Cool all” tickets by right clicking on any route and selecting Cool All Tickets from the menu, right clicking on any ticket and selecting Cool All Tickets from the menu or by clicking the “Cool All” control button.



You can hold down the {Ctrl} button on the keyboard then click to move tickets from the Pool to a Route, the Pool to the Stage, Route to Route, Scheduled to Sent, Sent to On Board, and On Board to Delivered. Read on for further explanation.

Moving Tickets

Pool to a Route, Stage to Route and Route to Route – select the desired ticket(s). Hold down the {Ctrl} button on the keyboard then click on the desired route column heading.

Schedule Board to Sent Board, Sent to On Board, On Board to Delivered – select the desired ticket(s) by clicking on the special needs icon, hold down the {Ctrl} button on the keyboard then click on the selected ticket(s) (not the route column). This will advance the trip ticket(s) to the next chronological step (Scheduled to Sent, Sent to On Board, On Board to Delivered (and off the Board). If you have selected tickets from more than one route and do not intend to move tickets into a single route, do NOT click a route column as this will result in all of the hot tickets to be moved into that route.

Pool or Route to the Stage – select the desired ticket(s) by clicking on the special needs icon and hold down the {Ctrl} button on the keyboard then click on the Stage.

Stage to the Pool – select the desired ticket(s) by clicking on the special needs icon and hold down the {Ctrl} button on the keyboard then click on the Pool. If you right click on any stage ticket(s) the “Information for a Stage Ticket” form will open. You can then click on the “Send to the Pool” button – this method involves one extra click.

NA
Kangaroo, Captain

NA	Phone: (555)1 23-4567	Tue Jan 6
Route: NA		
Bus NA: ; Driver: NA		

Addresses	Cities	Zones	Times
Pick up: Dunigan Res. (17689 Brewer Rd)	Grass Valley	S. Grass Valley	0800
Delivery Address		Delivery Zone	
Delivery: Pride (12451 Loma Rica Dr)	Grass Valley	Grass Valley	0910

Psngrs: 1	Provider: Telecare	Funder: AR Contract	Purpose: Health Related
Admits: 0	Fare Type: 5	Fare: \$: 0.00	Allocation: NA
Espts: 0			Code: NA

Trip Note	NA
-----------	----

Close
Send to the Pool

Route to the Pool – to move trip ticket(s) to the Pool select the desired ticket(s) by clicking on the special needs icon, hold down the {Ctrl} button on the keyboard then click on the Pool or right click on any trip ticket then click on “Move This Trip to Pool”.

Directly from anywhere to anywhere – You can change the “Conditional Trip” (and thus advance the ticket) within the various route steps (“Scheduled”, “Sent”, “On Board”, “Delivered”) by either selecting the ticket(s) or right-click on the ticket(s) then select the action desired. You can also change the “Conditional Trip” or status and simultaneously move a trip ticket from anywhere to anywhere else (that’s allowed) in Easy Rides when a trip ticket is open for editing. To change a single ticket while the “Edit Trip Form” is open: Change the “Conditional Trip” and/or “Route” which sets the status of the trip ticket.

Edit Trip Form

Client Name	ID	Age	Phone	Client Status	Special Needs	Vehicle Type
Pan, Peter	788	107	[555]123-4567	NA	Wheelchair	NA

Wednesday 01/07/2009

Stop Times Call Back

Reqst. Sch 0937 0937

1000 **1000**

Appointment None **Board Time** 5 mins.

Provider	Rate Type	Fare/Amount \$	Fare Type
Telecare	Service Area	2	CA/Vouchers

Nbr. Psngs 1 **Purpose** Personal **Reference** NA **DB List 3** NA

Nbr. Atkts 0 **P. Funder** Self **Income** High Single **DB List 4** NA

Nbr. Esrts 0 **S. Funders** NA **Sp Stats** NA **DB List 5**

Stoptovers 0 **Sche Agent** Jones, Pinocchio **DB List 6** **DB List 7**

Trip Note NA

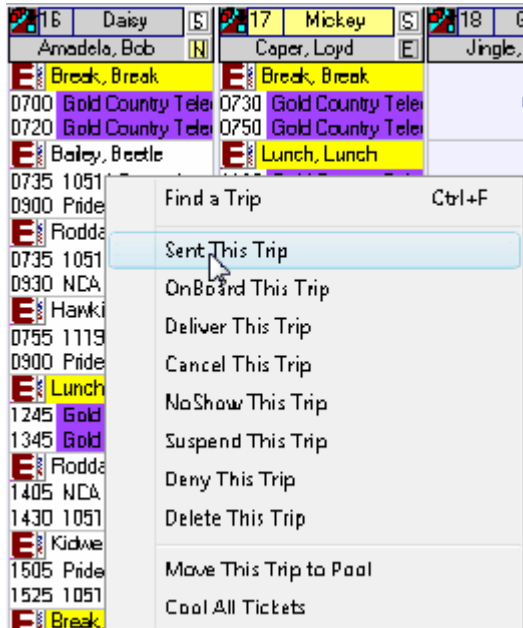
Client Note NA

Cancel Trip **OK**

Pickup Direction (11841 Old Tunnel RD) **Phone** ()

Dropoff Direction (252 S Auburn St) **Phone** (530) 273-2099 **Cancel**

Easy Rides will not allow a trip ticket to be marked as "Schedule", "Sent", "On Board" or "Deliver" when the route is set to "NA" because naturally, you can't do any of those things without assigning a route first. You may "No Show" a trip directly from the Pool, but usually a "No Show" is when a client doesn't call to cancel their trip in time to prevent it from already being scheduled.

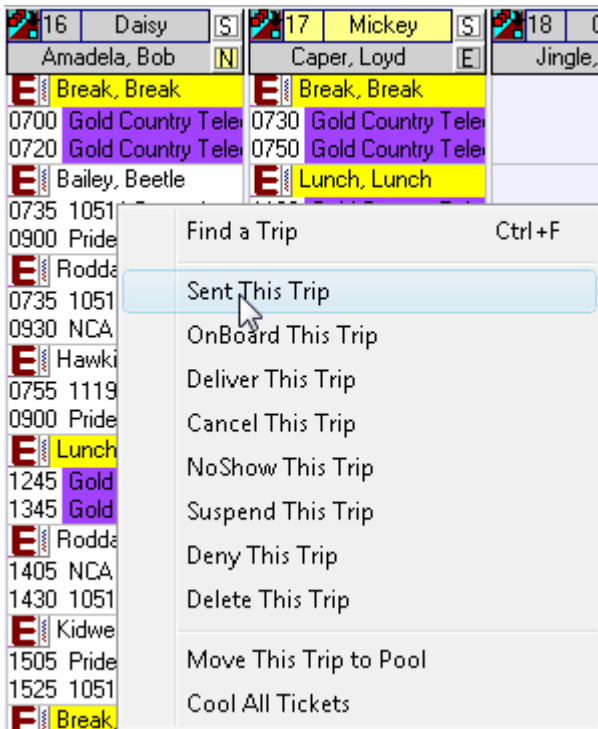


Stage – The Stage is the only place where you cannot open a trip ticket for editing. Right clicking on a Staged Ticket will display the "Information for a Stage Ticket" window which has a "Close" button and a "Send to the Pool" button.

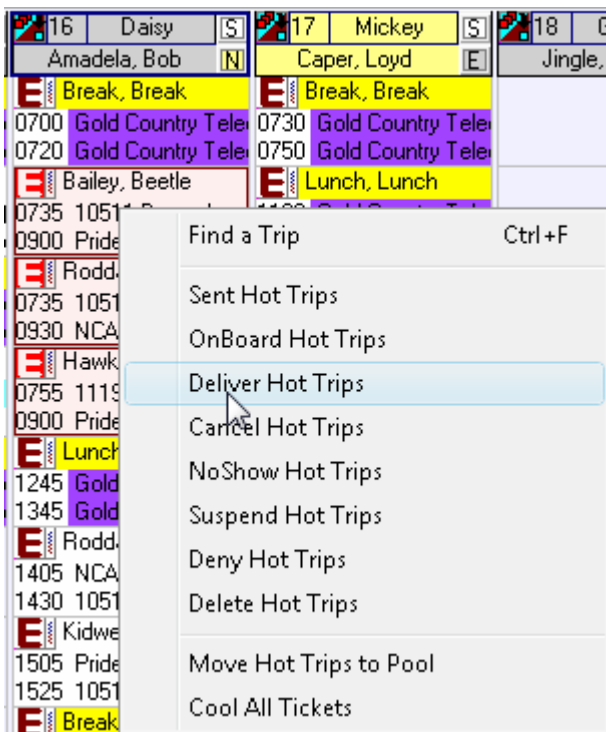
There is more than one way to handle trip tickets when using the Dispatch Board. Probably the easiest thing to remember is that right-clicking on almost anything in Windows will display a menu or list of options for whatever you

selected. The Easy Rides Dispatch Board has two right-click options (besides the standard Microsoft Window options). The first involves right-clicking on a route heading. The other is:

Right-click on a ticket – When you right-click on a trip ticket without any other tickets selected (“hot”) the resulting menu refers only to the specific ticket you clicked on – in this case, “Sent This Trip” is about to be selected.



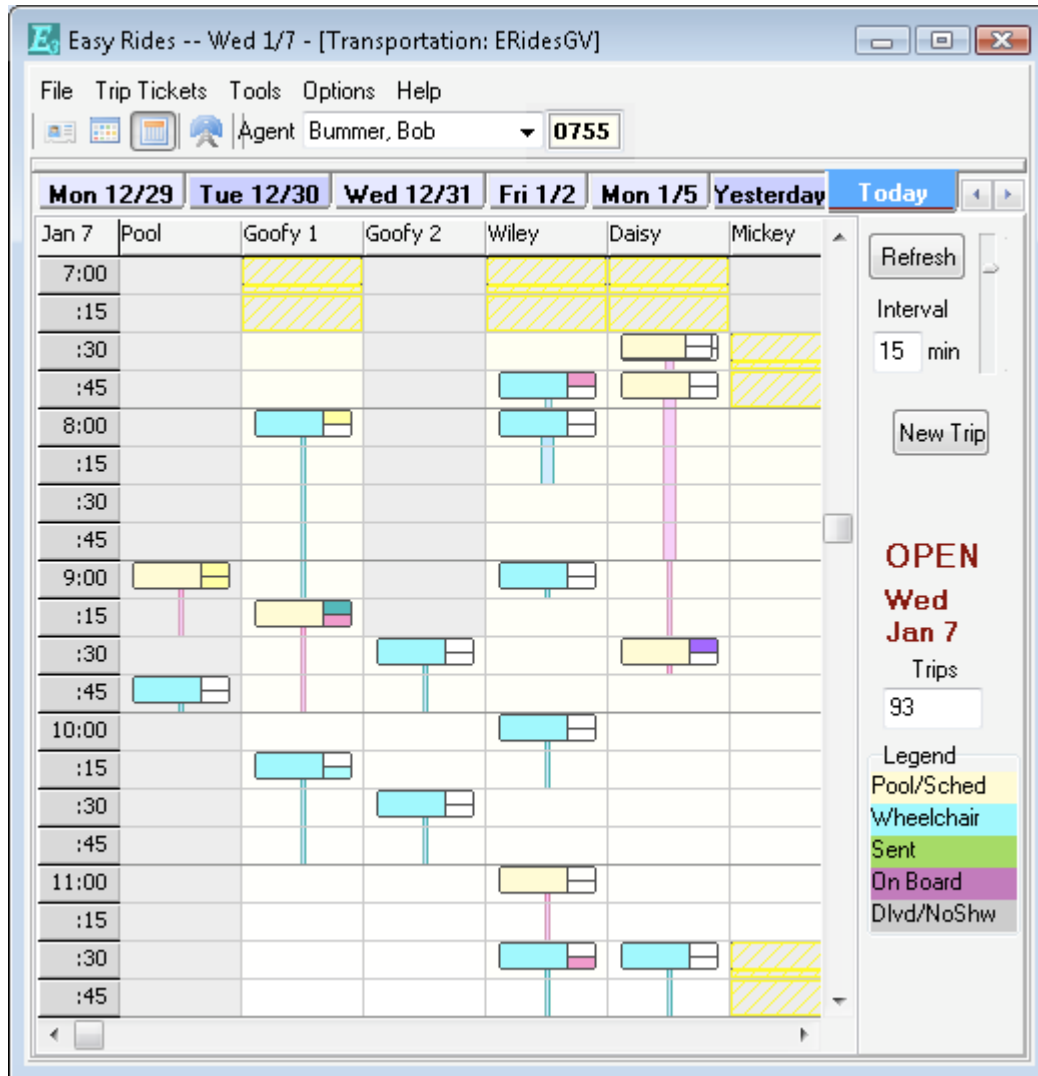
Right-Click on a group of hot tickets – When there are hot tickets, the menu will display a list of actions to perform on ALL hot tickets.



Planner Board Watch the Video

The Planner is a great resource for managing trip tickets and being able to easily spot potential openings for a trip on a day schedule that has already been created. It also works great for verifying there are no tickets on a day schedule before you archive and delete it. You can get to the Planner Board by clicking on the Planner button on the Dispatch Board. The Planner offers several functions to speed the operations of scheduling and dispatch.

Day Schedules are accessed at the top just as they are on the Dispatch Board.



At a glance you can see where there are time slots available on each route. Each column represents a route with the route name at the top of the column. There is also a column for the Pool. White areas represent times when no pick-up is scheduled. In this instance time slots are in fifteen minute increments. Time slots can be set to anywhere from 1 minute to 61 minute increments.

Change the intervals for viewing trips

Click on the number in the interval box, input a number between 1 and 61 and click on the Refresh button or use the slider bar to the right of the interval box

Colored Tickets on the Board

Each colored cell indicates pick-up(s) are scheduled for that time period. Tickets that appear to be stacked indicate more than one trip scheduled for that time frame. The bar extending downward from each ticket indicates how long that trip is scheduled on the vehicle.

Yellow - trips that are scheduled or are in the pool

Blue - at least one rider is in a wheelchair

Green - sent to the driver

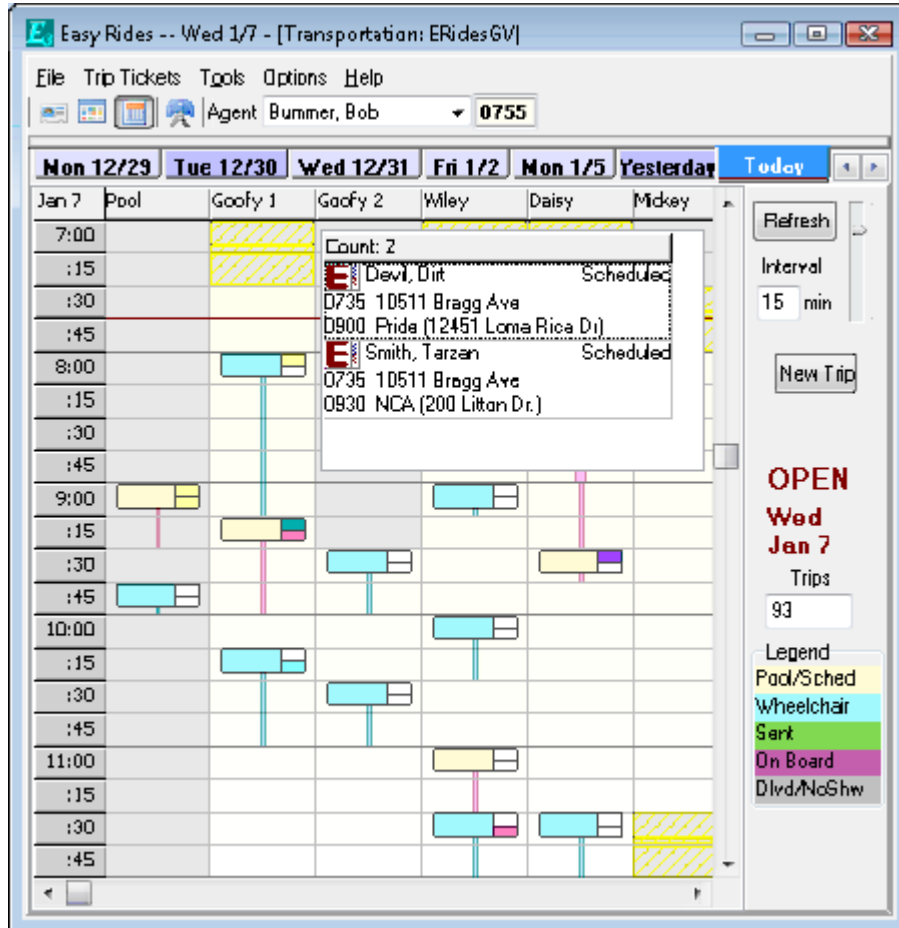
Magenta - the rider is on board

Gray - not on the schedule board (staged, delivered, no show, cancelled, denied, deleted, suspended).

Note that the total number of scheduled trips is displayed on the Planner Board directly above the color legend for trip tickets. In this instance there are expected to be 93 trips for the day. The colors on the right of each cell represent the pickup and drop off zone colors. The gray cells with yellow diagonal stripes represent gap tickets for breaks, lunches etc.

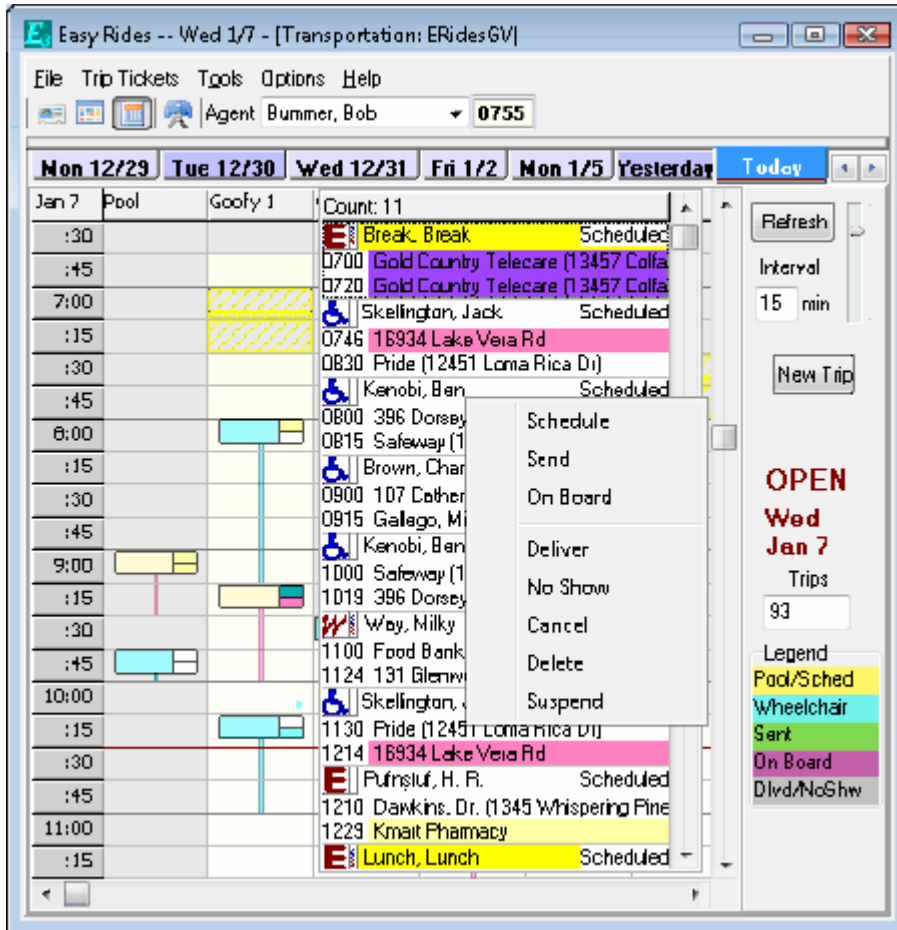
Viewing and Editing Trip Tickets

To view the ticket(s) at a particular time and route, click once on the corresponding cell. In the example on the right the Daisy route at 7:30am was selected. There are two Trip Tickets associated with this time period and the summarized information is displayed on the Planner.



From here, if you single click on a Trip Ticket, that individual's Trip Ticket Form will be displayed. Changes can be made to the Trip Ticket Form and will be saved if you press the OK button at the bottom of the form. You will need to click on the "Refresh" button in order to display the changed information on the planner.

Clicking on a Route heading at the top of the grid will display the number of trips for the Route and a list of all of the trips assigned to the Route for the Day, sorted in order of pickup time. In the example on the right the Wiley route was selected.



Additional Options for Handling Tickets on the Planner

Right-clicking on a ticket will display a popup menu. The Trip Ticket status can be changed by clicking on one of the eight menu items: Schedule, Send, On Board, Deliver, No Show, Cancel, Delete or Suspend. When you return to the Planner, you must click on the "Refresh" button in order to update the information display.

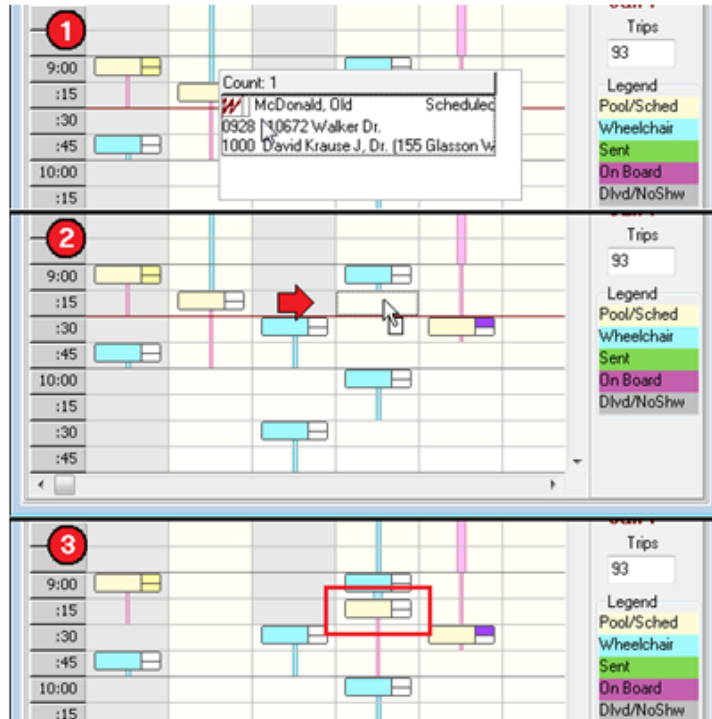
Adding a Trip Ticket

It is possible to add trips while use the Planner Board. Right click on the cell corresponding to the time and route where you want to add a trip. A single menu item "New Trip" appears. Click on the "New Trip" item, and the client list will appear. Select a client's name from the list and press the "Add A Trip" button. When the Trip Ticket appears it will include the time and route you selected. Complete the Trip Ticket with the destination address and other pertinent information then press the OK button at the bottom of the Trip Ticket Form. You will need to click on the "Refresh" button in order to display the new ticket on the Planner.

Moving Trips From One Route To Another

The planner board allows you to consolidate trips onto fewer routes resulting in cost savings. For instance, if there are only a couple of trips on one route, we may be able to move those trips to another route thereby eliminating a route for the day. If we determine another route can accommodate both of the trips and is in the general area for the pickups, we:

1. Click one of the tickets
2. While holding down the CTRL button on the keyboard, click and drag the ticket left or right to any other route
3. When the mouse is released, the trip moves to the other route



Planner Capacity Notification

The Planner board also calculates possible schedule capacity problems when vehicles are assigned to routes. Routes that appear to have too many scheduled wheelchairs or not enough seats at a certain time are marked with a red column heading and the time where the conflict occurs will be shaded in an orange and white caution color.

Jan 29	Pool	Doc	Ti

Trip Intervals

You can select the intervals that apply when printing fixed interval style manifests.

Coloring Trip Tickets



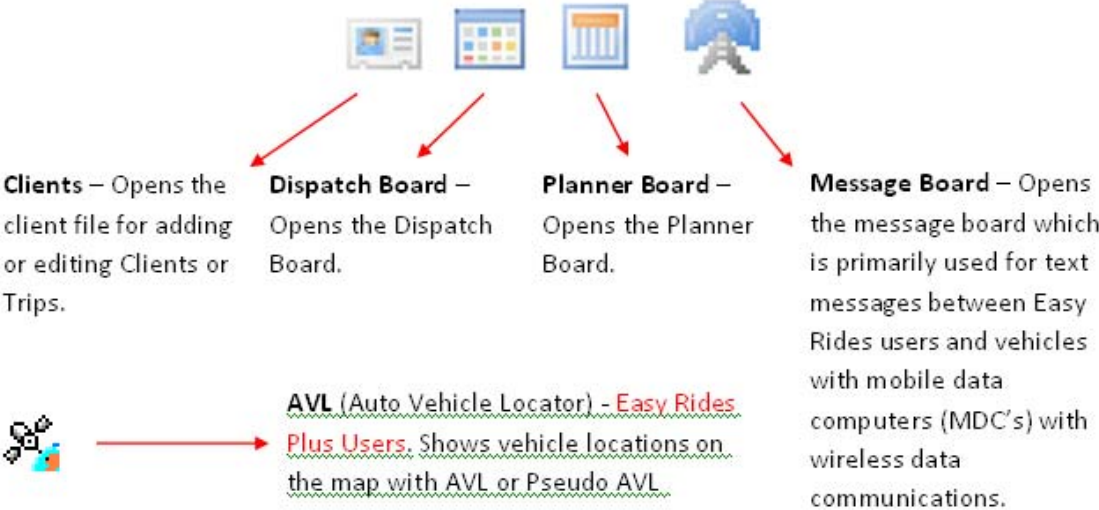
This feature provides numerous benefits. First, the Cool All button cools all Hot tickets. The second button allows users to flag selected hot tickets with a specific color. The third button makes hot, all tickets of a specific color.

E Kidwell, Lorinne	W Conr
0735 10511 Bragg Ln	0815 105
0900 Pride (12451 Loma	0930 Sev
E Hawkins, James	W Gerry
0755 1185 Alpine Ln	0825 131
0900 Pride (12451 Loma	0930 Sev

Understanding the Icons

On the Dispatching Screen you will see two rows of Icons. Here are their meanings.

Top Row Icons:



Second Line Icons:



The “Calendar” button allows you to toggle between open schedule days. Days that have been created appear bold.



The “Refresh” button refreshes the display using current data in the database. When more than one person is making changes to the same Day Schedule, the Refresh button is used to display the changes made by other people.



The “Alarm” button displays the alarm dialog box. An unlimited number of alarms can be set to notify you of important events. For example, alarms can be set to notify you when a driver’s break is due and when it is over. This button flashes and an optional alarm sounds when the alarm goes off.



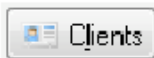
The “Sort by Time” button sorts the tickets by pickup time when the arrow is up, and by delivery time when the arrow is down. The shaded square indicates the current state.



The “Sort by Zone” button sorts the tickets by pickup zone when the arrow is up, and by delivery zone when the arrow is down. The shaded square indicates the current state.



The “Sort by Client” button sorts the tickets by client and pickup time. The shaded square indicates the current state.



The “Clients” button displays the Client List.



“Buddies” (formerly “Groups”) enable trip tickets to be associated. This allows for simultaneous handling of grouped tickets.



The “Cool All” button cools all hot tickets.



The “Color Selector” allows users to flag selected hot tickets with a specific color (Red, Blue, Black or Green).

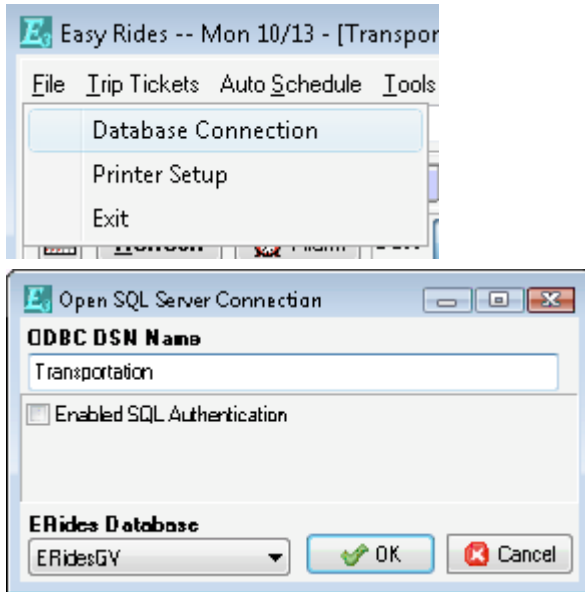


The “Hot Trigger” will make hot, all tickets of a specific color.

Understanding the Menu Bar

[File](#)

Database Connection – Almost never used, “Database Connection” displays the “Open SQL Server Connection” form where you can select available databases from the “Transportation” SQL Server Connection or ODBC connection. Normally you will only see one database, “ERides”, available. You may see other databases if you administer multiple transportation operations using their own databases or if you have restored databases with a different name.



Printer Setup – This is menu item is to ensure you have the correct printer defaulted to print manifests and to select other printer options.

Exit – Selecting Exit, closes Easy Rides. This is equivalent to clicking the red X in the top right corner of the application.

Understanding the Trip Tickets Menu Bar

[Trip Tickets](#)

Display Trips – This item displays a list and count of trip tickets currently existing for a day and time period of your choosing. Use the calendar form to select the date and if desired fill in the time fields then click the “Go” button. Once the list is displayed, you can sort the list by Client Name, Route or Pickup Time by clicking on the buttons above the columns at the top of the form.

E3 Locate Trips by Time

Sort By Name | Sort Route | Sort Time

NAME	Route	PickUp Time
Hallquist, Heidi	IBM	0630
Hallquist, Heidi	Enterprise	0700
Hallquist, Heidi	Road Runner	0700
Hallquist, Heidi	Daisy	0700
Hallquist, Heidi	Wiley	0700
Hallquist, Heidi	Grumpy	0700
Briggs, Barbara S	IBM	0710
Adams, Nita	IBM	0715
Cuff-Riske, Donald	Goofy 1	0728
Frost, Larry	IBM	0730
Hallquist, Heidi	Mickey	0730
Kidwell, Corinne	Daisy	0735
Casey, Fred	Goofy 1	0735
Rodda, Carl	Daisy	0737
Hansen, Michelle	Grumpy	0740

DATE
10/13/2008

FROM 0 **TO** 2359

No. of Trips 145

List Rerun Trips – Selecting this item displays the list of Long Term Rerun (Subscription) trip tickets currently existing. Displayed information includes Client Name, day of the week the ticket is to be created, Start and End Dates of the Subscription. You can search for a client's rerun by clicking into the "Search by Last Name" field. The list will scroll to and highlight the closest match to your typed text. When you see the desired Rerun, click once anywhere in that row to select it then click on the "Edit", "Supress" or "Delete" button as needed. Double clicking on a row (rerun) will, by default, open the "Rerun Trip Form" for editing.

Long Term Reruns Listing

Client Name	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Start Date	End Date
Adams, Nita	False	True	True	False	False	True	False	09/12/2006 10	12/31/2008 10
Adams, Nita	False	True	True	False	False	True	False	09/12/2006 10	12/31/2008 10
Adams, Nita	False	False	False	True	True	False	False	09/12/2006 10	12/31/2008 10
Adams, Nita	False	False	False	True	True	False	False	09/12/2006 10	12/31/2008 10
Alspaugh, Lenora	False	True	True	True	True	True	False	09/12/2006 10	12/25/2008 10
Alspaugh, Lenora	False	True	True	True	True	True	False	09/12/2006 10	12/25/2008 10
Auckenthaler, Robert	False	False	False	False	True	False	False	04/30/2008 10	07/29/2009 10
Auckenthaler, Robert	False	False	True	False	False	True	False	09/24/2007 10	09/19/2008 10
Auckenthaler, Robert	False	True	False	False	False	False	False	09/24/2007 10	09/19/2008 10
Auckenthaler, Robert	False	True	True	False	False	True	False	09/24/2007 10	09/19/2008 10
Auckenthaler, Robert	False	False	False	True	False	False	False	09/24/2007 10	09/19/2008 10
Auckenthaler, Robert	False	False	False	False	True	False	False	02/07/2008 10	05/07/2009 10
Auckenthaler, Robert	False	False	False	True	False	False	False	01/22/2008 10	12/21/2008 10

Search By Last Name

Find A Trip - Clicking on this submenu item will display a list of all trip tickets in the Current (Open) Day Schedule ordered by client name. Double clicking on a Trip Ticket will open the Trip Ticket Form for viewing or editing.

Find Trips: Day Schedule For Mon, Oct 13							
NAME	PU T	PU Address	DO T	DO Address	STATUS	Time	Route - Bus ID
Adams, Nita	0715	19182 Swallow Wy.	0900	Pride (12451 Loma Rica Dr)	Scheduled	NA	IBM - Bus 24
Adams, Nita	1514	Pride (12451 Loma R	1640	19182 Swallow Wy.	Scheduled	NA	Scooby Doo - Bus 26
Alspaugh, Lenora	0840	16762 Greenhorn Rc	0930	NCA (200 Litton Dr.)	Scheduled	NA	IBM - Bus 24
Alspaugh, Lenora	1420	NCA (200 Litton Dr.)	1440	16762 Greenhorn Rd	Scheduled	NA	Scooby Doo - Bus 26
Auckenthaler, Rober	0750	11464 Bedrock Dr	0830	Pride (12451 Loma Rica Dr)	Suspended	NA	Enterprise - Bus NA
Auckenthaler, Rober	1508	Pride (12451 Loma R	1610	11464 Bedrock Dr	Suspended	NA	Gadget - Bus NA
Barnhart, Mary Barb	0815	14144 Pierite Rd	0945	NCA (200 Litton Dr.)	Scheduled	NA	Wiley - Bus 15
Barnhart, Mary Barb	1413	NCA (200 Litton Dr.)	1525	14144 Pierite Rd	Scheduled	NA	Wiley - Bus 15
Briggs, Barbara S	0710	11436 Buckeye Circl	0900	Pride (12451 Loma Rica Dr)	Scheduled	NA	IBM - Bus 24
Briggs, Barbara S	1512	Pride (12451 Loma R	1645	11436 Buckeye Circle	Scheduled	NA	Scooby Doo - Bus 26
Briskin, Lawrence	0820	238 Colfax Ave	0915	NCA (200 Litton Dr.)	Scheduled	NA	Daisy - Bus 16
Briskin, Lawrence	1402	NCA (200 Litton Dr.)	1420	238 Colfax Ave	Scheduled	NA	Daisy - Bus 16
Brown, Michael D	1504	Pride (12451 Loma R	1520	13326 Hillview Rd	Scheduled	NA	Scooby Doo - Bus 26
Casey, Fred	0735	10992 Laurine Way	0910	Pride (12451 Loma Rica Dr)	Scheduled	NA	Goofy 1 - Bus 14
Casey, Fred	1504	Pride (12451 Loma R	1525	10992 Laurine Way	Scheduled	NA	Goofy 1 - Bus 14
Coley, Joanne	0805	18377 Penn Valley D	0840	Pride (12451 Loma Rica Dr)	Scheduled	NA	Grumpy - Bus 25
Coley, Joanne	1502	Pride (12451 Loma R	1530	18377 Penn Valley Dr.	Scheduled	NA	Grumpy - Bus 25
Conrad, Jean	0815	10560 Walker Dr	0930	Seventh Day Ad.Church PV (176	Scheduled	NA	Mickey - Bus 17
Conrad, Jean	1432	Seventh Day Ad.Chu	1520	10560 Walker Dr	Scheduled	NA	IBM 2 - Bus 24
Coppinger, Gertrude	0745	12141 Elnora Dr	0900	NCA (200 Litton Dr.)	Scheduled	NA	Grumpy - Bus 25

Filter

Name	Trip Type	Trip Status	Trip Detail	Trip Count	Click on a column header to sort the list.
<input type="text"/>	All	All	Route - Bus ID	181	<input type="button" value="Print Grid"/> <input type="button" value="Close"/>

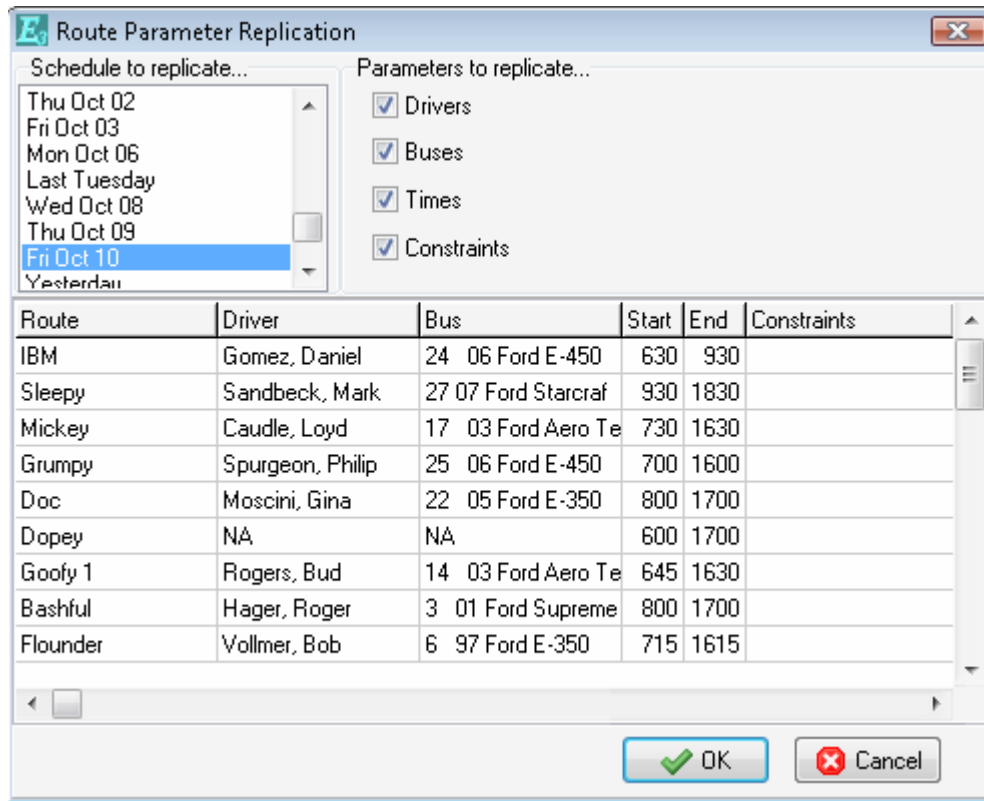
Deliver/Suspend Trips – The Deliver feature allows for handling groups of tickets. Suspend Trips removes trip tickets from the Dispatch Board for later handling. Additional details are provided further down in this document.

Add a Route - Clicking on this menu item will display a list of routes available to be added to the current Day Schedule.

Rearrange Routes - Selecting this menu item will open the Arrange Route Form which allows you to delete or change the order of routes on the Dispatch Board. Clearing the checkbox from the Arrange Route form, will delete the route and cancel trip tickets contained in the route. Clicking and dragging a route allows you to change its position on the board.

Show/Hide Routes – This menu item will open the Show/Hide Routes Form, which looks very similar to the Arrange Route Form. Clearing the checkbox will hide a route, clicking a blank checkbox will enable a hidden route to be displayed.

Route Parameter Replication – (Easy Rides Basic) Selecting Route Parameter Replication allows a user to set a day schedule with the same drivers, vehicles, times and constraints as another day schedule.



Create A New Day Schedule – Selecting Create A New Day Schedule allows you to create a new day schedule on the Dispatch Board. How to Create a Day Schedule is covered in more detail further down in this document.

Import Tickets – An optional tool to allow importing of trip tickets from other software. Please contact us at 888-806-6595 for more info.

Understanding the Tools Menu Bar

Tools

Reconcile Fares – This item opens the “Reconcile Fares for Delivered Trips” form to select a Date and Driver to see what fare box revenues should be accounted for. Reconcile Fares is covered in more detail in [Chapter 10](#) of this User Guide.

Reconcile Fares for Delivered Trips

Date: 10/14/2008
 Driver: Rogue, Bud

Print
 Close

Double click to list trips for the fare type

Fare Type	Trips	Passengers	Amount
REQUIRED	0	0	0.00
NA	0	0	0.00
CA/Vouchers	0	0	0.000
Cash	10	10	20.00
Direct Bill	0	0	0.00
Office	0	0	0.00

Check Rerun Status - Displays a list of Reruns (Subscriptions) that expired or are scheduled to expire in the number of days you specify. Functionally the same as "List Reruns" on the "Trip Tickets" menu, but filtered for expiration. Rerun Trips can be edited, suppressed or deleted from the results window.

Check Reruns Counter

LIST ALL RERUNS EXPIRING WITHIN

30
 DAYS

OK Cancel

Check Permit Status - Displays a list of Clients whose authorization has expired or is expiring in the number of days specified. Double clicking on a Client or selecting the Client then clicking the "Edit" button opens the Client Form for editing.

List Locked Out Clients - Displays a list of Clients that have a "Lock Out" date that is greater than today.

Client ID	Name	Lock Out Date
155	Sloppy, Joe	10/1/2008 14:23:14

Scheduled-Time Altered List – Available to systems with Auto Scheduling, this feature makes it easy to contact customers to inform them of time changes.

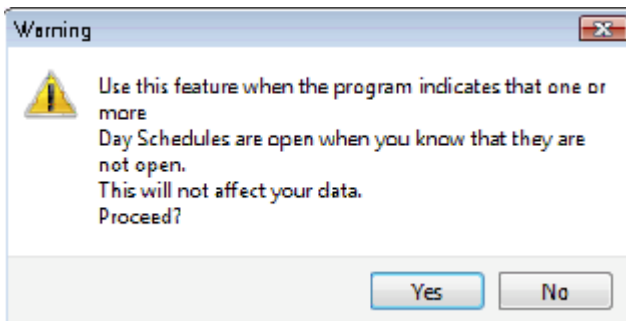
Easy Ride Reminder - An optional feature is available allowing users to select a list of clients and automatically call them to remind them of their upcoming trip. A customized, pre recorded message is played, with the date and time of their first scheduled pick inserted into the message. A web interface is available to review the outcome of each call. Call 1888-806-6595 for more details.

Addresses – Opens the Address List for editing, which is discussed in more detail in chapter 3 of this document.

Consolidate Addresses – This utility allows you to locate and consolidate duplicate addresses, find non geo-coded addresses and other address maintenance tools. Consolidate Addresses is discussed in more detail in chapter ? in this User Guide.

Update Rerun Addresses - After you have edited, updated or consolidated addresses, it is recommended users run this tool so that Easy Rides will update Rerun (Subscription) trips in the database with the latest information. This tool will not work on “Freeform” addresses that have been manually entered as text into Client files, trip tickets, or Rerun’s address fields. “Freeform” addresses refers to the process of typing an address directly into an address field (not selecting one from the address database). To prevent individuals from adding “Freeform” address go to Utility, Global options, and check “Address Select Only” option. This will greatly enhance the functionality of Easy Rides and maintain data integrity.

Reset Open Schedule Counter – For each day schedule that is open, there is a small file created on the computer. This allows Easy Rides to warn users that a day schedule is already open to minimize errors or duplication of efforts while working on the same day schedule. Occasionally, this temporary file is not deleted by Windows when the schedule is closed and will result in Easy Rides warning that a day is already open. When you know for sure that there are no other users with that day open, the “Reset Open Schedule Counter” will cause Easy Rides to delete all temporary open schedule files, which will reset the error message.

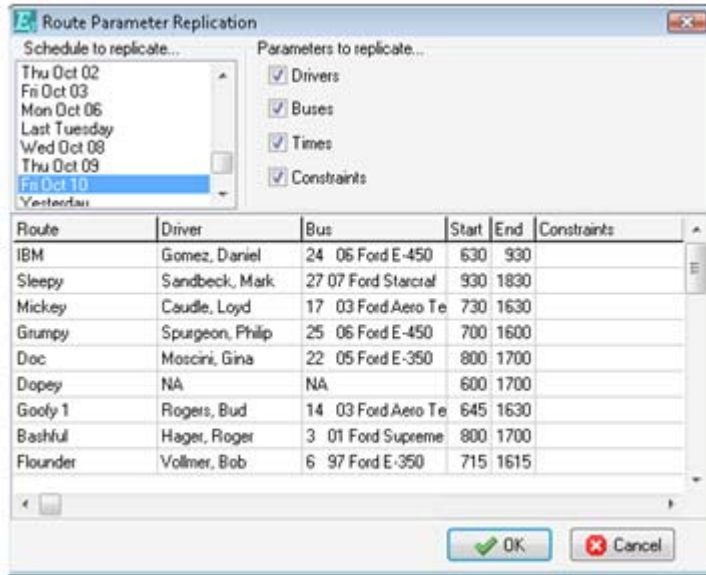


Review Trips by Trip Note – This option allows you to search by trip note instead of the customer last name.

Understanding the AutoSchedule Menu Bar

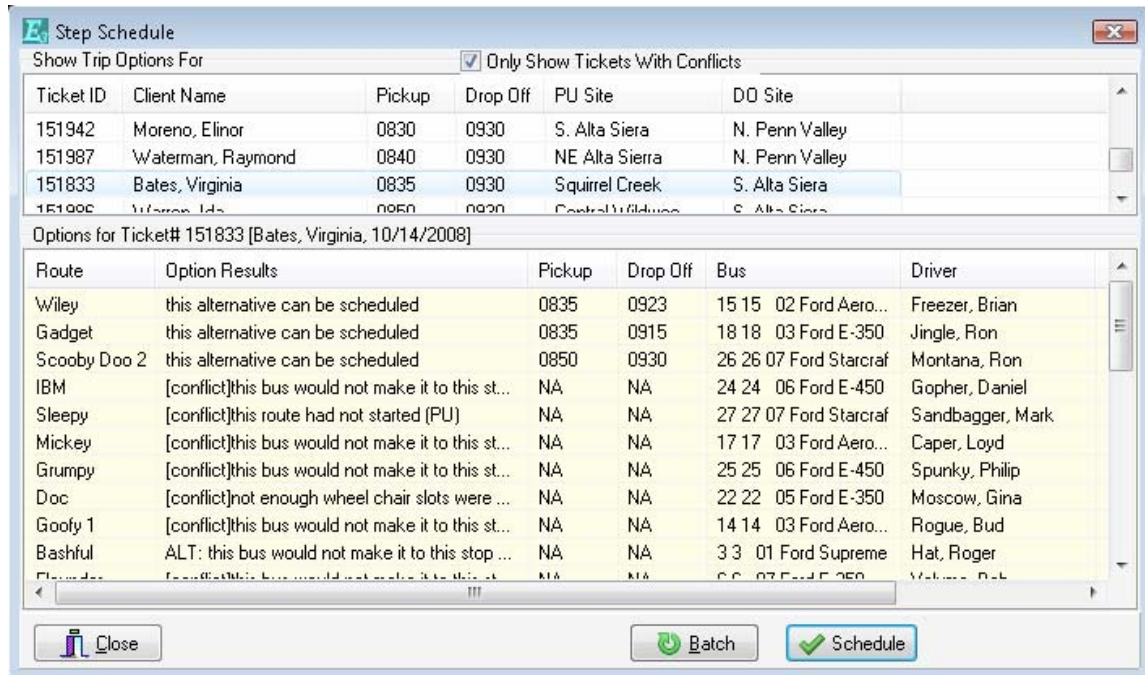
[Auto Schedule \(Easy Rides Plus\)](#)

Route Parameter Replication – Selecting Route Parameter Replication allows a user to set a day schedule with the same drivers, vehicles, times and constraints as another day schedule.



Auto Schedule Mode – This item allows a user to choose between two options: “Avoid Additional Buses In Use” and “Avoid Additional Drive Time”.

Step Schedule – (Easy Rides Plus) With the Step Schedule feature, the user can cycle through all of the trips that have yet to be assigned to a route. These are the trips in the pool. A list of all feasible runs is displayed for each ticket, with the “best” runs positioned first. The scheduler also has the ability to undo step scheduling trips.



Conflict Check - Before assigning a ticket to a run (route), the scheduler can check the feasibility of the assignment (i.e. check to see if the trip can fit onto the specific run). If not feasible for the run, the reason why is displayed. Also, a list of other runs that are feasible is displayed. The scheduler can assign the ticket to any of the runs by double clicking on that run in the list. Trips can be scheduled in advance, or scheduled on the fly. Changes can be made up through the time of service, including rescheduling trips for buses that suddenly are out of service or adapting if a driver calls in sick for work.

Batch Schedule - Batch scheduling will automatically assign trips to runs according to parameters established by the scheduler. The Auto Scheduler can be used to optimize the schedule multiple times up to and including the day of service, without violating customer's half-hour pick-up window (or whatever window of time the transit system chooses)

Easy Rides Plus provides the schedulers with the opportunity to set a variety of service parameters that are then included in the process for auto-scheduling. These parameters fall into three categories: Run (Route) Constraints, Scheduling Parameters, and Trip Ticket Parameters.

Run Constraints are the capacities and limits that are associated with a run. These include the starting time and ending time, breaks and vehicle wheelchair and seating (including jump seat/wheelchair trade-offs). The scheduler may also limit the types of trips that can be assigned to a run. For example the run may be reserved for a particular group of providers, group of funders, or for a set of custom parameters established by the scheduler.

Scheduling parameters are used in the optimization process across all runs. They include dwell time, optimization basis (productivity, travel time), and early and late arrive-slack times.

Trip Ticket Parameters are parameters that are associated with each trip ticket. These include client embark/disembark times. In addition, each trip ticket can be assigned one of four priorities: Pickup, Drop off, both, or none. This priority determines whether a trip must meet within tight limits the Pickup, Drop off, or both scheduled times. A "Group" may be created for several trips (mother/child, bridge club, etc.) and the tickets will be scheduled on the same vehicle.

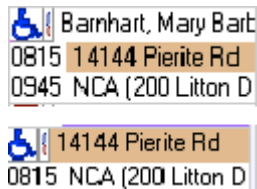
Make Auto Scheduled Tickets Hot – Self Explanatory

Cool All Tickets – Self Explanatory

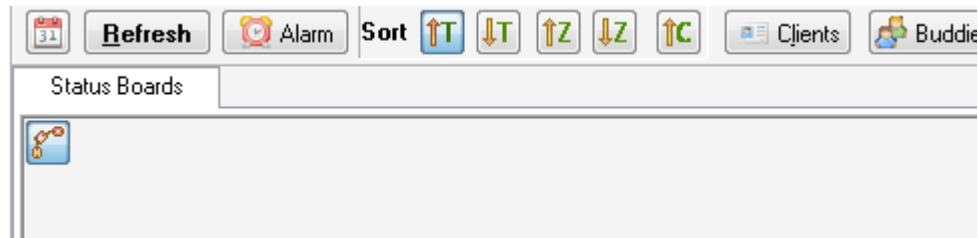
Understanding the Options Menu Bar

Options

Display Tickets Large – When this option is checked, the trip tickets on the Dispatch Board are displayed the default size with; Special Needs Icon, Name, Pickup and Delivery Times and Addresses. Clearing this checkmark will cause the trip tickets to be displayed smaller with only the Special Needs icon, the pickup and delivery address, and only the pickup time – Client name and delivery time are not listed on small ticket display size.



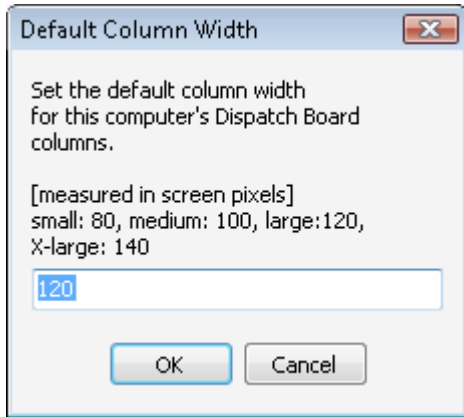
Show Stage – When this option is checked, the stage area is displayed.



Fixed Row Count in Pool – This option toggles between a fixed height of 4 rows in the pool and a variable number of rows in the pool. This can be useful for larger screens.

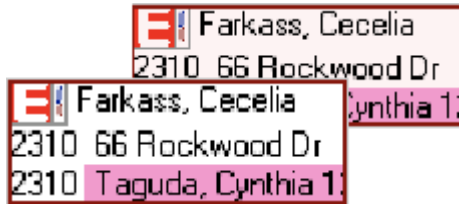
Default Dispatch Column Width – This option allows you to specify the desired width (in pixels) of the columns in the dispatch board. You select the width, click the OK button then exit and re-launch Easy Rides to make the change.

Default Planner Column Width – This option allows you to specify the desired width of the columns in the planner board. Just like setting the default dispatch column width, you select the width (in pixels), click the OK button then exit and re-launch Easy Rides to make the change.



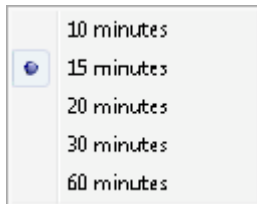
Alarm Sound On – This option is used to enable a sound along with a visual alert when an alarm’s time is up.

Show Whole Ticket ‘Hot’ – When this option is checked, ‘Hot’ trip tickets on the Dispatch Board are displayed with a pink tint in addition to the red background of the icon. Clearing this checkmark will cause ‘Hot’ trip tickets to just have the icon background in red.



Keep Easy Rides On Top – Check this option to keep Easy Rides visible on top of other windows so it is always easily accessible.

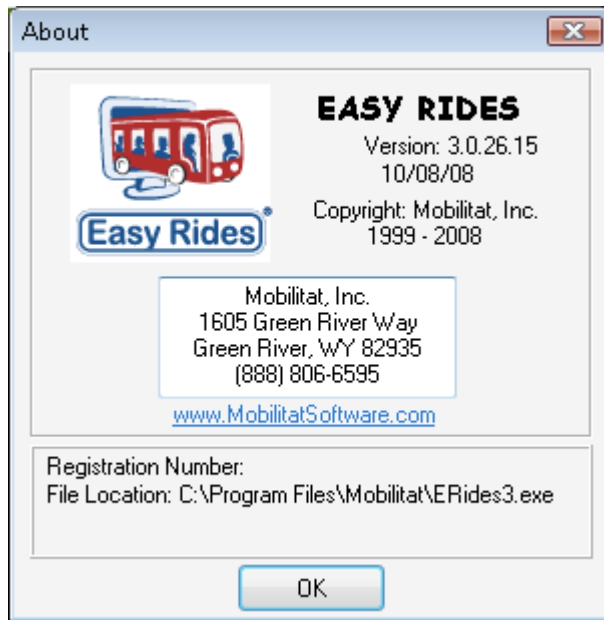
Manifest Intervals – Select the intervals when printing fixed interval style manifests.



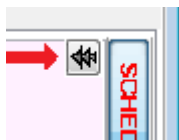
Other Menu Bar Items

Help

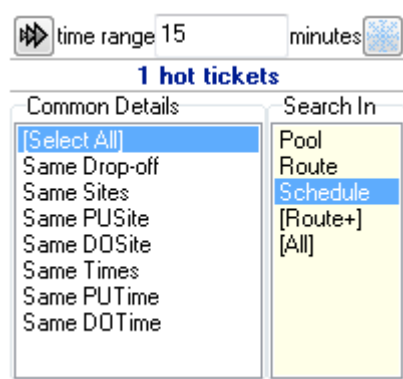
About – This screen tells you which version or release of Easy Rides you are running, release date, key code, location of the program and contact information for Mobilitat. Click on this item when you need support and call us!



Selector Tool



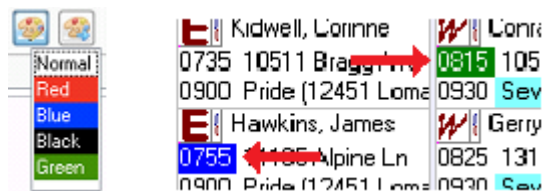
Click on the set of arrows on the left to open the Selector Tool. When you make a ticket hot, you can then set a time range and choose to see all the tickets in the Pool, Route, Schedule, Route+ (includes sent and onboard trips) or All having the same Pick-up, Drop-off, Pick-up time or other options. The selections accumulate so if you make one hot ticket, find similar tickets in the pool, you can then add more similar tickets from another area like a route. You can then choose to place the results in one route thus making scheduling easier and maximizing your routes



Trip Note Color Buttons



This feature provides numerous benefits. First, the Cool All button cools all Hot tickets. The second button allows users to flag selected hot tickets with a specific color. The third button makes hot, all tickets of a specific color.



About Grouping Tickets

Uses of Buddies (Buddies and Grouped Tickets are used interchangeably here)

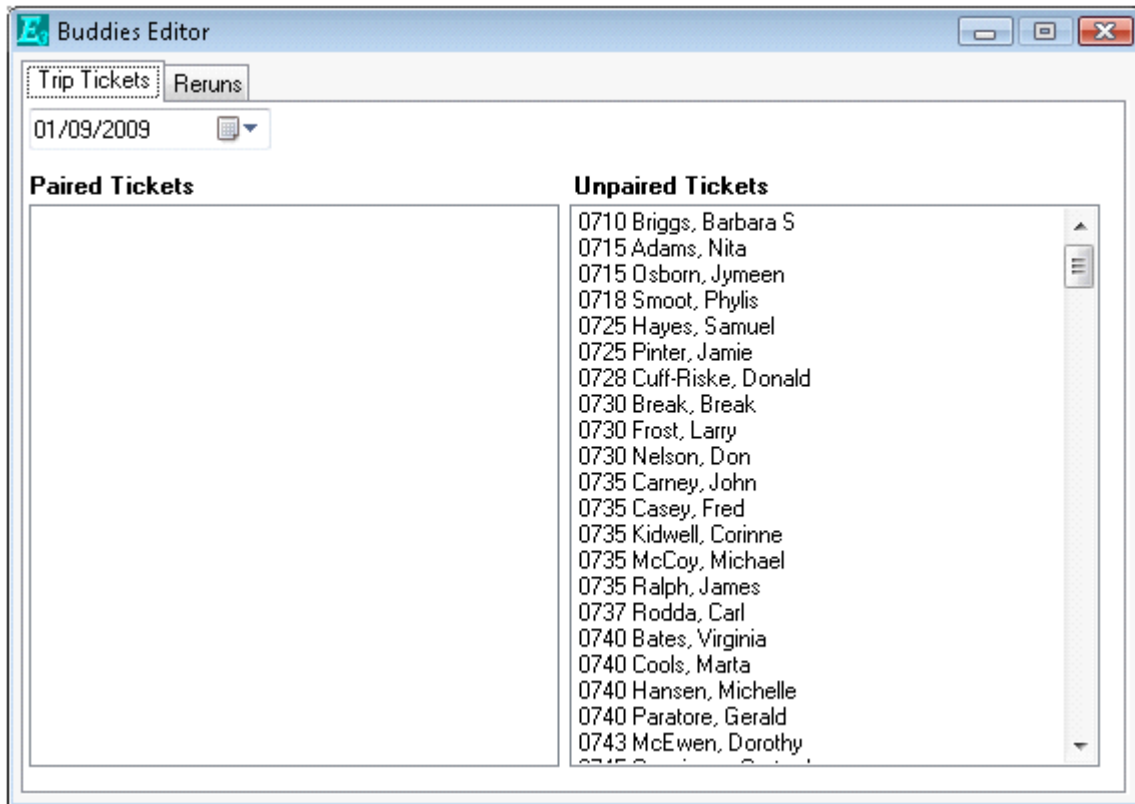
Buddying trip tickets can be a handy way of handling trip tickets that always go together (such as parents and kids or client and attendant) because you only have to treat one of the Buddies tickets. This also has the potential for error however, if trip tickets in a group are actually more independent than you may have thought. For example, let's say that Vivian and Ted both reside at the same apartments and almost always travel together to the Senior Center at the same times so you have their Reruns set as Buddies. One day, Ted isn't going (but Vivian still is). As long as you cancel Ted's ticket and check the other leg(s) of Ted's trip(s) but NOT Vivian's trip(s) in the "Client Has Other Trips" window you'll be OK. But if you forget about Ted's trip tickets, they may follow Vivian's trip tickets step by step as you handle them through the process and may end up being delivered without your notice or warning from Easy Rides

Trip tickets can be grouped (buddied) together so when you handle one ticket in the group the other tickets are also selected for the same action, for example a mother traveling with a child should be grouped. When you move a buddied trip ticket around on the Dispatch Board (to a route, sent, on board, delivered) all of the tickets buddied with it are moved also. Buddied tickets consist of a "Parent" ticket which is the beginning of the group and one or more "Child" tickets. The terms "Parent" and "Child" in this instance refer only to the original ticket (Parent) and the other tickets (Child) associated (Buddied) – NOT an actual Parent/Child relationship.

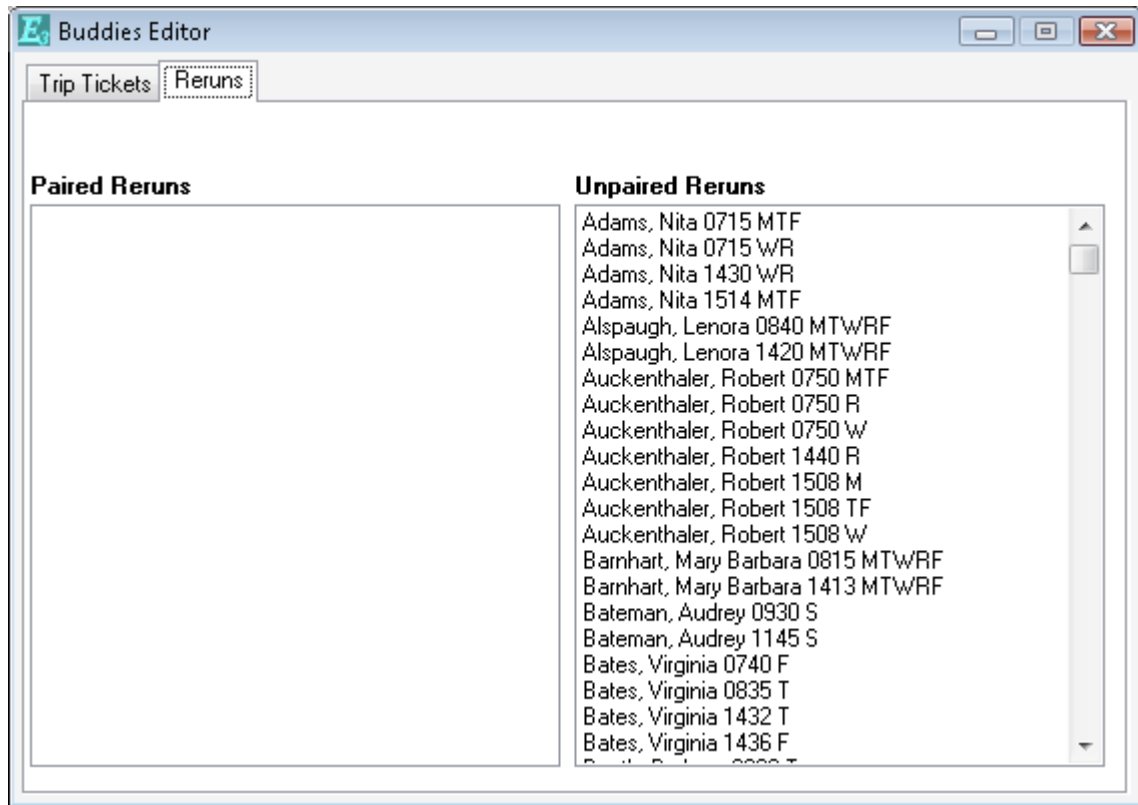
Open the Buddies Editor Buddies

From the Dispatch Board click on the "Buddies" Button, you will notice the screen is divided into a left pane (with Paired tickets) and the right pane (Unpaired tickets).

Trip Tickets tab– if you wish to edit or create paired regular trip tickets, click on the "Trip Tickets" tab and use the calendar form to select the desired date. Tickets show Pickup Time and Client name (Last, First).



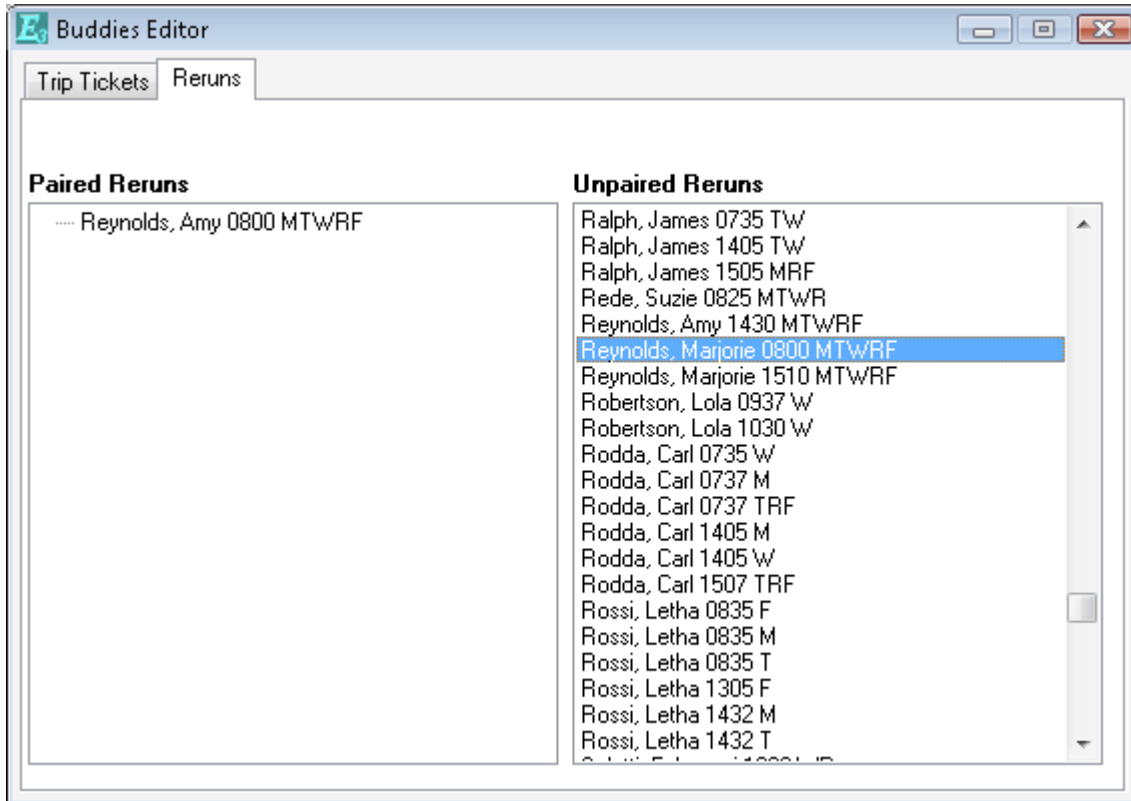
Reruns tab– if you wish to edit or create paired Reruns, click on the "Reruns" tab. Rerun Tickets show Client name (Last, First), Pickup Time and days of the week the Rerun is scheduled to load. There is no calendar form on the Rerun tab because you are working with trip templates (Reruns) and not actual trip tickets. Once the day schedule is created, those paired Reruns will also display as regular trips on the "Trip Tickets" tab.



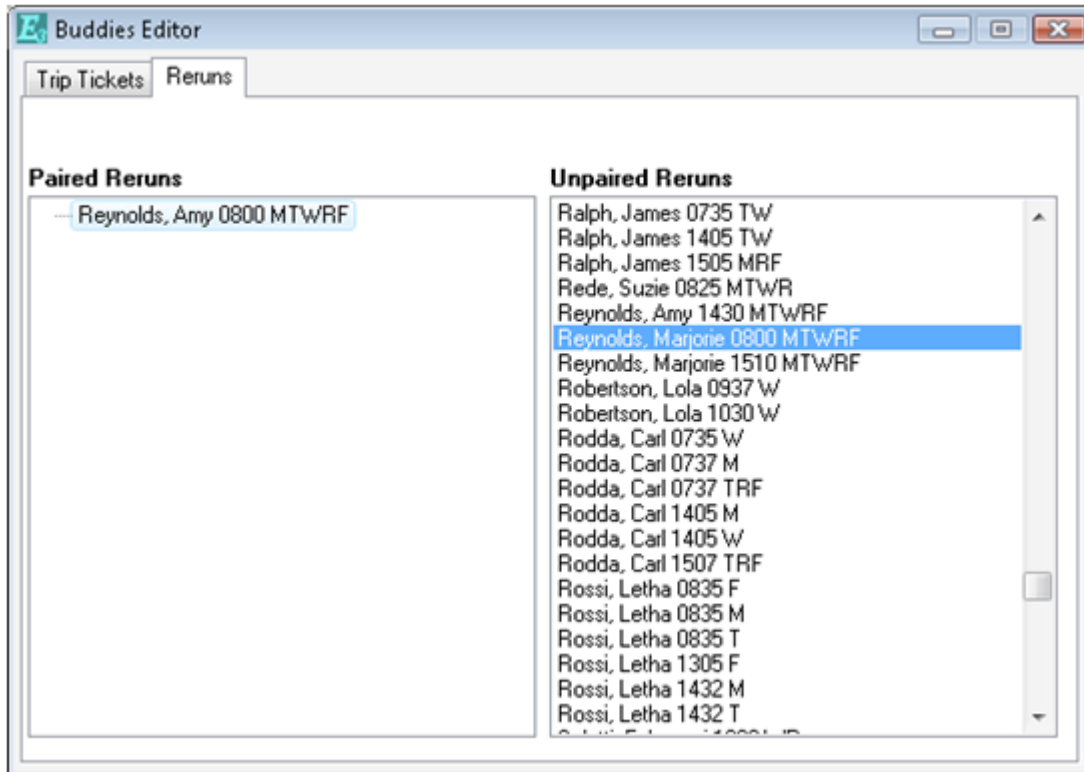
Working with Grouped Tickets See Also

To Create Buddies

Locate the first trip ticket to be paired from the right side of the Buddies Editor form and drag it to the left side of the form to begin the pairing (this is called the "Parent" ticket). In this case, we want to buddy Amy and Marjorie Reynolds together on their morning Reruns so we drag Amy's morning rerun trip ticket from right to left. We wouldn't want to put more than one leg of a client's trip tickets in the same group so in the event multiple legs, we would create two groups for the client.



With the desired "Parent" ticket highlighted, drag and drop the other trips, one at a time, from the right pane onto the top of the original ticket in the group.



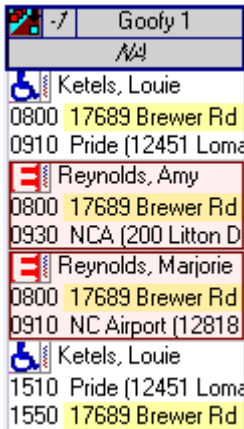
You should now see a (▲) symbol to the left of the "Parent" ticket and the "Child" ticket beneath as an indication the tickets are associated (Buddies). Clicking on the (▲) symbol to the left of the "Parent" will collapse the group from view. Clicking the (▼) symbol to the left will expand it again.

Edit a Group

If the desired Parent ticket isn't already expanded, click the (▼) symbol to the left to expand the Buddies to see the other Buddy names. Click and drag tickets from the right to the left (dropping them on the "Parent") to add to the group, or drag and drop tickets from left to right to ungroup those tickets. You must first remove all "Child" tickets from a "Parent" ticket prior to moving the "Parent" ticket back into the ungrouped tickets column.

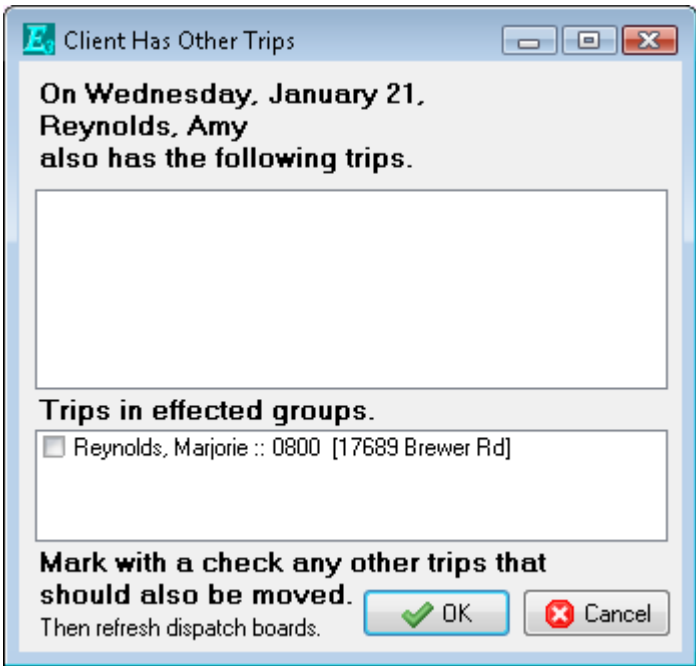
Moving Grouped Tickets

Click on the special needs icon of any of the grouped tickets you wish to move – notice that all of the tickets in the group are also selected (made hot). Move as desired to a route, Sent, On Board or Delivered all of the tickets in the group will also move to the same location or status.

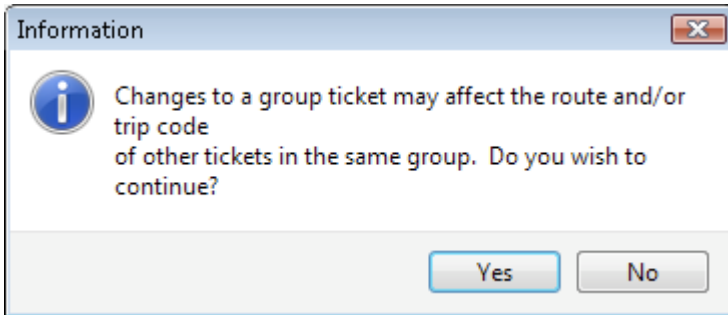


Changing Conditional Trip of Grouped Tickets

If you right click on a ticket that is Buddies with another and "Cancel", "No Show" or "Delete" the trip(s), the "Client Has Other Trips" window will open displaying the other legs (if any) of that Client's trips as well as other Client's trips that are Buddies. In this case, we right-clicked on Amy's 0800 trip and clicked "Cancel This Trip". *It should be noted, that "Suspend" or "Deny" will only affect the one trip you clicked on.*



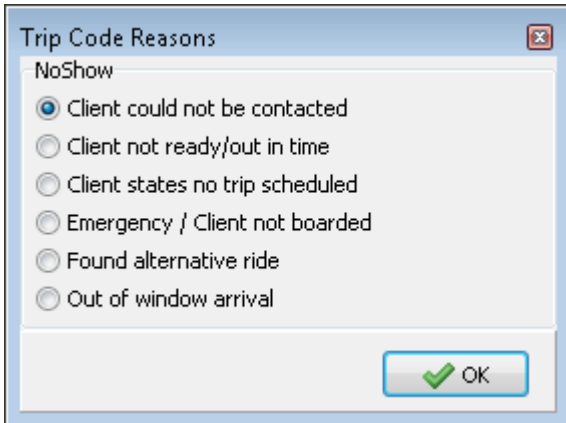
In some cases you may also see this information popup.



Trip Code Reasons

Trips can now be finalized (Delivered, No Show, Cancelled, Deleted, Suspended, Denied) with reasons associated with Trip Codes.

If there are more than one trip code reasons for a trip code then a box will pop up when that code is selected for a trip.



If only one Trip Code Reason exists for a Trip Code, then it will be selected automatically without further user input. If no Trip Code Reason exists, then the trip will be finalized and closed in the usual way.

The Trip Code Reasons must first be setup in the utility and associated with the appropriate Trip Codes. These are entered in the utility in the same manner as other lists and found under Admin>Programs and Fares>Trip Code Reasons. Be sure to select the appropriate Trip Code for each item entered.

The screenshot shows a window titled 'Statuses' with a toolbar containing navigation and action icons (back, forward, home, search, refresh) and an 'OK' button. Below the toolbar is a table with the following data:

Order	Reason	Trip Code	Status
100	Client could not be contacted	No Show	Active
100	Client not ready/out in time	No Show	Active
100	Client states no trip scheduled	No Show	Active
100	Emergency / Client not boarded	No Show	Active
100	Found alternative ride	No Show	Active
100	Out of window arrival	No Show	Active
150	Per appointment office	Canceled	Active
150	Per client	Canceled	Active
150	per client caregiver/guardian	Canceled	Active
150	Per client family	Canceled	Active
200	Abusive customer	Denied	Active
200	Driver unable to assist	Denied	Active
200	Not enough resources available	Denied	Active
200	Request outside of hour of operation	Denied	Active
200	Request outside of sched policy	Denied	Active
200	Safety concern (Boarding location)	Denied	Active

Easy Rides Tools

About the Tools

The Utilities section of Easy Rides contains various tools. The tools let you perform a variety of actions on your data. Please note that the Tools enable you to change your data and **should be used carefully!**

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.

Edit Delivered Trips

Kidwell, Corinne **Route** **Daisy #14** **Delivered** ▾

Vehicle **Driver Name and Number**

16 03 Ford Aero Tech **Amadela, Bob #2** **01/27/2009** ▾

Scheduled Time	Pickup	Delivery		
	1505	1525		
Actual Time	Arrived	On Board	Delivered	Departed
	0000	0000	1303	0000
Odometer	Start	Pickup	Delivery	End
	0.00	0.00	0.00	0.00

Site **PU** **Loma Rica** ▾

DO **Rockwood** ▾

Lookup/Calculate Mileage

Site Table PU/DO Start/End

Rate Type	Base Fare	Rate \$/Mile	Miles	Amount \$
Service Area ▾	2.00	0.00	0.0	2.00
		Estimated	0.0	2.00

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

Log Odometer and Time

Display Controls
Organize By: **Route** ▾ Select: **Wiley** ▾ From: **10/01/08** ▾ To: **10/31/08** ▾

Route	Vehicle	Driver	Event	Date	Time	Odometer
Wiley	15 02 Ford Aero Tech	Freezer, Brian	End Service	10/31/08	1600	139454.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	End Service	10/31/08	1600	139454.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Non-Revenue	10/31/08	1525	139447.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Revenue	10/31/08	1355	139415.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	End Service	10/31/08	1255	139415.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Revenue	10/31/08	0736	139357.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Non-Revenue	10/31/08	0700	139347.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	End Service	10/30/08	1600	139347.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Non-Revenue	10/30/08	1524	139340.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Revenue	10/30/08	1400	139316.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	End Service	10/30/08	1300	139316.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Revenue	10/30/08	0737	139261.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Non-Revenue	10/30/08	0700	139251.00
Wiley	15 02 Ford Aero Tech	Freezer, Brian	End Service	10/29/08	1600	139251.00

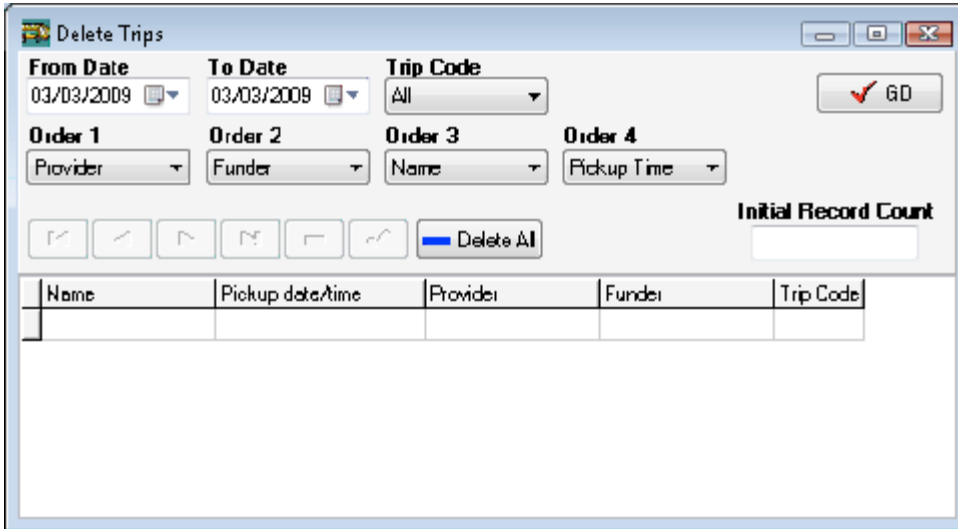
First select the way you want the information organized: by Route, Vehicle, or Driver. Then Select the option to be displayed (in this case we chose the Wiley Route). Set the date range. To add an event, click Insert Row. Mark the event by selecting Start Service, End Service, or Dead Head. Fill in the 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

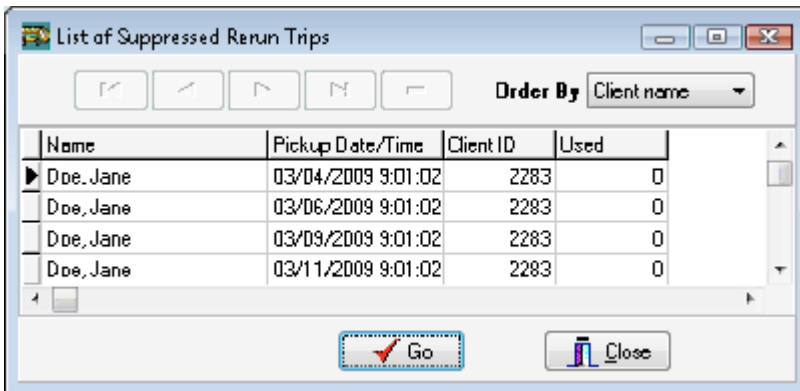
RECOMMENDATION: Carefully consider the impacts this operation will have on your system before deleting trips.

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

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

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.

The screenshot shows a software window titled "Review Client Entry Dates". It contains a table with the following data:

Last Name	First Name	Date Entered	Funder
Aldridge	Ethel	Feb 06, 09	Self
Amick	Juanita	Feb 22, 09	MV Manor
Aratari	Ruby	Feb 18, 09	Self
Bill	William	Feb 04, 09	MV Manor
Brown	Kathrin	Feb 26, 09	Self
Bryant	Sandra	Feb 20, 09	Self
Buchanan	Bert	Feb 08, 09	Self
Chavez	Myron	Feb 05, 09	Self
Clarke	Joanne	Feb 07, 09	MV Manor
Darden	Bob	Feb 01, 09	Self
Farmer	Marjorie	Feb 11, 09	Self
Griswold	Marc	Feb 04, 09	Self
Guyer	Niccole	Feb 01, 09	Self
Guyer	Jane	Feb 13, 09	Self
Hammond	John	Feb 04, 09	REQUIRED
Hannah	Carl	Feb 12, 09	Self

On the right side of the window, there is a control panel with the following elements:

- From Date:** 02/01/2009
- To Date:** 02/28/2009
- Order By:** A dropdown menu currently set to "Last Name", with options "Last Name", "Date", and "Funder" visible.
- Buttons:** "GO" (with a checkmark icon), "Print", and "Close" (with a window icon).
- Client Count:** A display showing the number "51".

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.

Client Last Trip List

Client ID	Client Name	Last Trip	Days
776	Pollock, Joan	Sep 13, 2006	902
925	Butcher, Gloria	Sep 20, 2006	895
901	Lawyer, Alice	Sep 22, 2006	893
989	Bassett, Pearl	Oct 03, 2006	882
798	Ditmars, Irma	Oct 03, 2006	882
1002	Oberg, George	Oct 03, 2006	882
896	Blankerhorn, Helen	Oct 05, 2006	880
1009	Rutherford, Lois	Oct 05, 2006	880
997	Beals, Michael	Oct 06, 2006	879
1027	Worley, Betty	Oct 07, 2006	878
1024	Bullard, Ruth	Oct 09, 2006	876
1031	Collar, Jody	Oct 09, 2006	876
415	Groscup, Mary Lou	Oct 09, 2006	876
1045	Cacho, Eloise	Oct 11, 2006	874
574	Heseltine, Wilma	Oct 13, 2006	872
969	Lindop, Esther	Oct 13, 2006	872
1043	Olson, Beverly	Oct 13, 2006	872
1030	Fidler, Illa	Oct 15, 2006	870
357	Munoz, Florence	Oct 16, 2006	869
995	Richardson, Patricia	Oct 17, 2006	868
58	Jensen, Marie	Oct 19, 2006	866
1074	Olmstead, Doris	Oct 19, 2006	866
676	Thompson, Verna	Oct 19, 2006	866

List all of the Clients who have had no trips in the previous days.

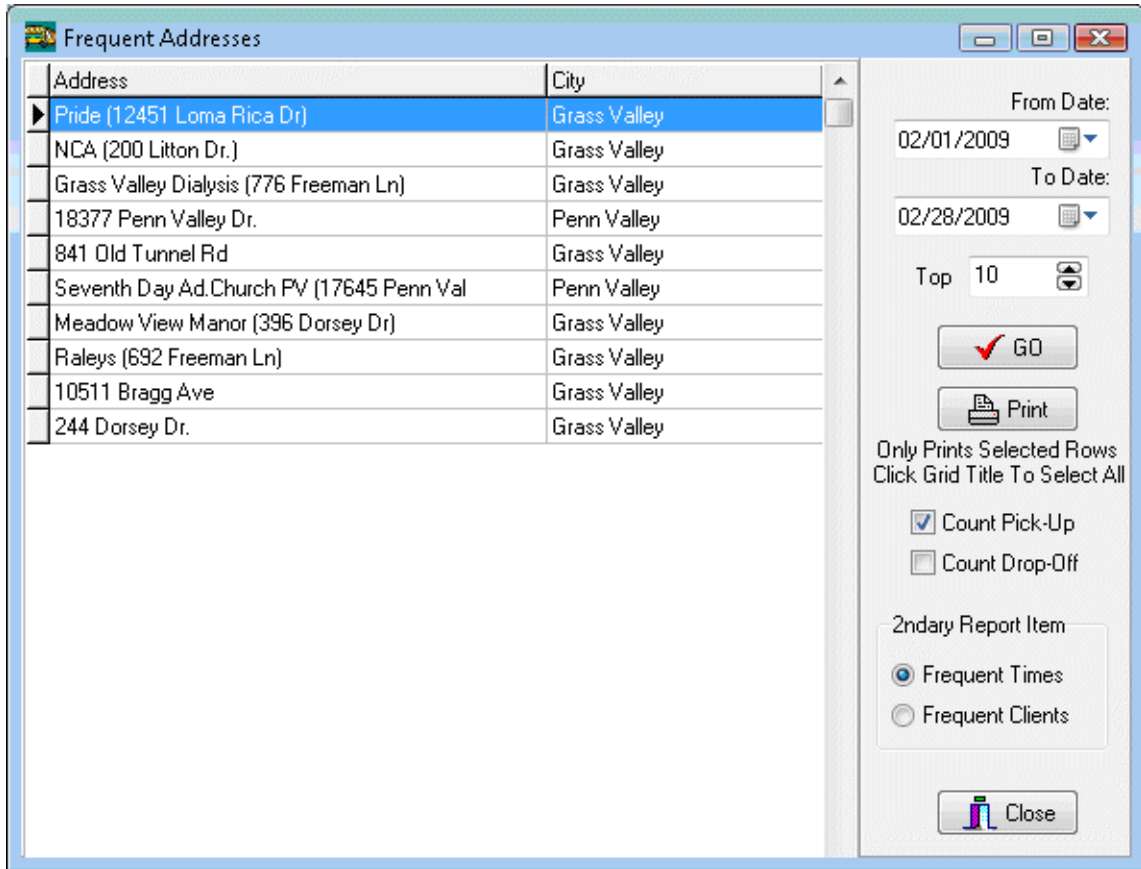
Include Inactive Clients

Cut Off Date

Total Count

Frequent Addresses

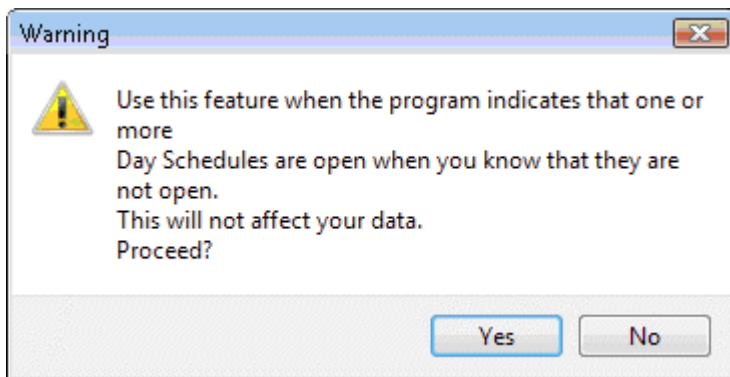
Choose this tool to see a list of addresses most frequented by your customers. This can be helpful for administrators who may want to ask certain agencies, department stores, and owners of local businesses for assistance with costs such as tickets, bus shelters, bus equipment etc. The system can tell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



Reset Open Schedule Counter

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.



Reporting

About Reports

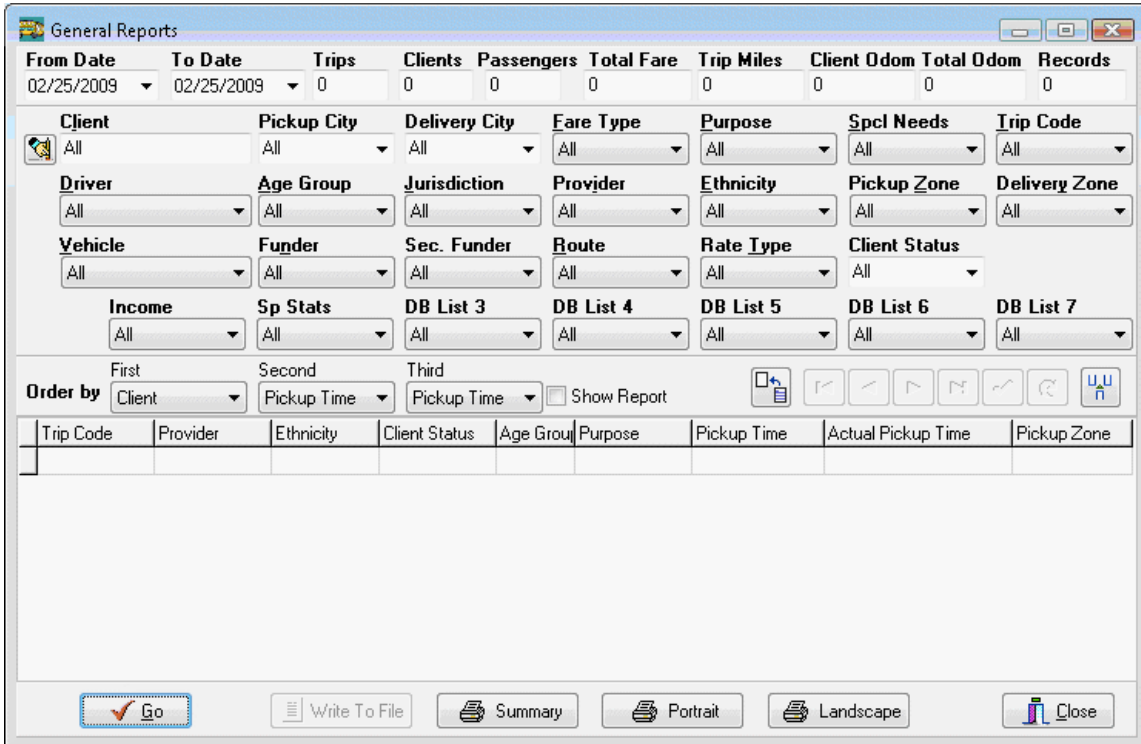
Easy Rides has a variety of reporting options. Many reports are access through the Easy Rides Utility Reports Menu, and some, such as the driver manifests, are accessed through that particular software feature. Easy Rides also has a variety of options that let you create your own custom reports and billing formats.

Watch the General Reports Video

Monthly Rides Report See Also

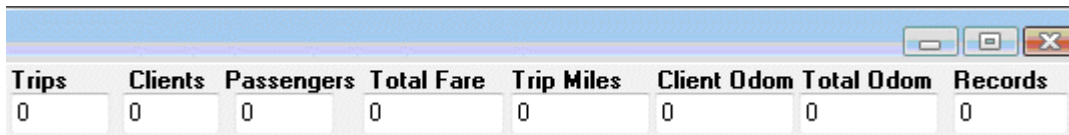
Although the Easy Rides Monthly Report Screen may seem daunting when you first look at it, it provides a comprehensive and straightforward way to obtain management and administrative information about the rides you deliver. This report uses information contained in the Trip Archive table. Watch the Video .

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

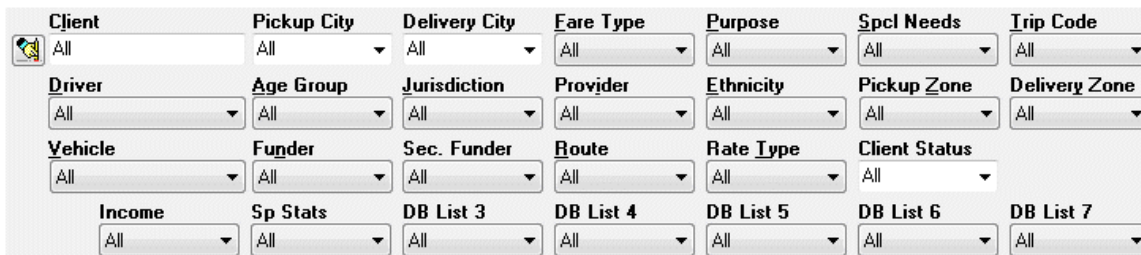


The screen has four different areas.

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):

Client Name	Actual Delivery Time	Client Status	Driver	Fare Type	Fare	Funder	Reference	Jurisdiction

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



Defining the 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 the 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.

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).

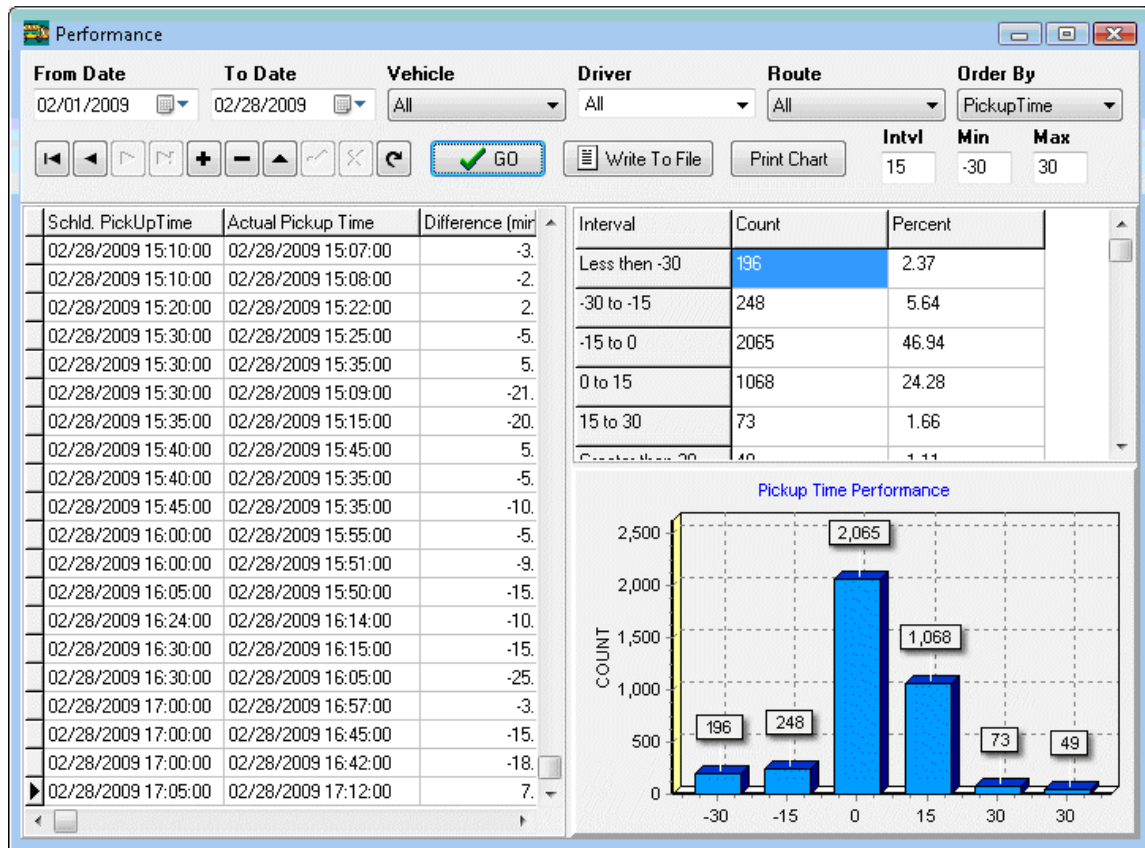
To print only the Query and its results, choose "Summary".

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.

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. Watch the Video.

To find this report, Click Reports then PickUp Performance.



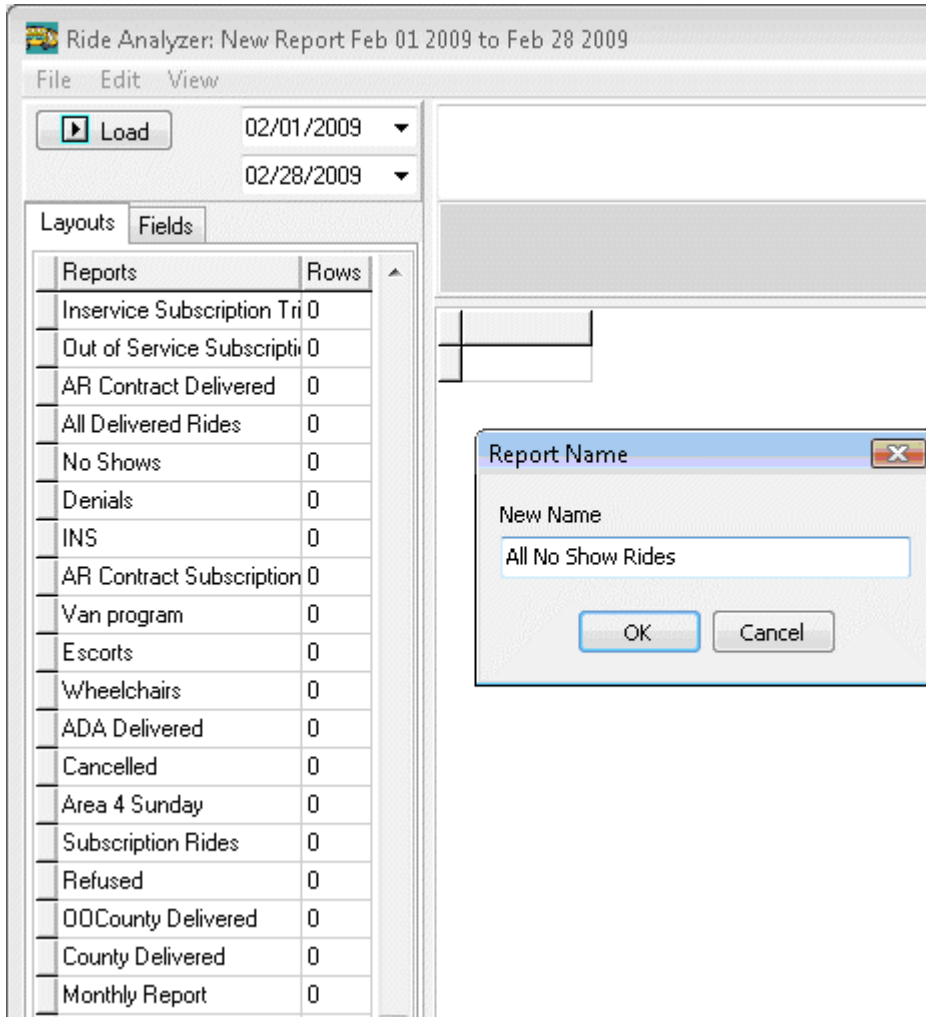
This report shows a 1.5-hour pick-up window. The industry standard for on-time performance is to include all rides 15 minutes before a scheduled pick-up and 15 minutes after. Those three columns, added together, indicate 3,381 rides were picked up on-time. The chart is printable and can be used to show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

Rides Analyzer See Also

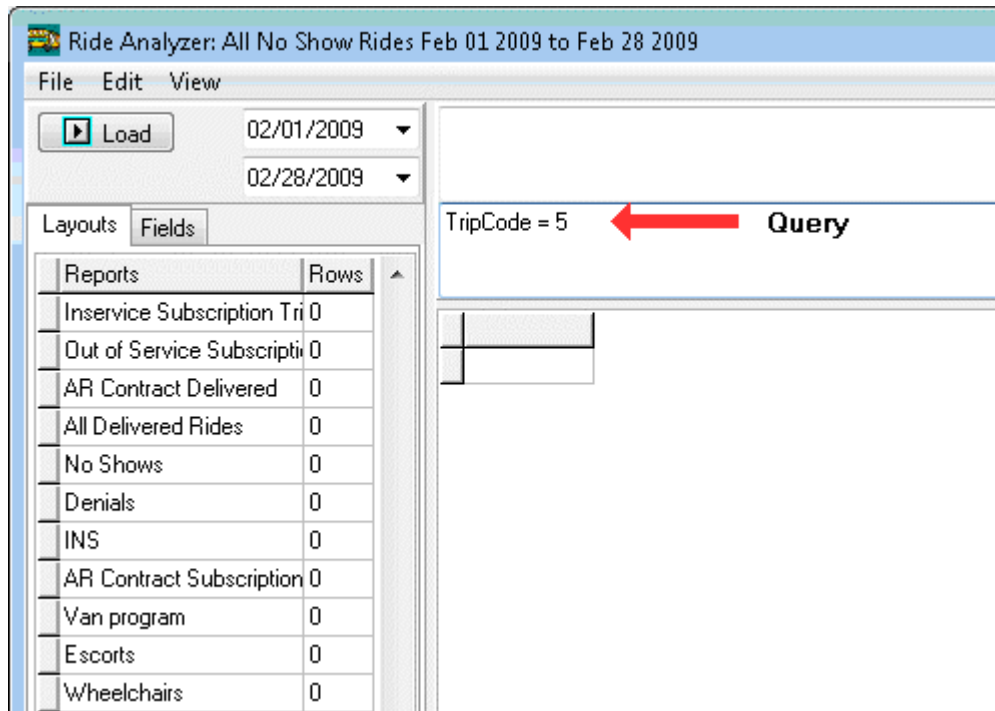
The Rides Analyzer is our advanced reporting tool. It can perform the same tasks as the Rides(Monthly) report, but it can save multiple queries so we don't have to manually set the query each time we use it. It can be used for getting common count information such as how many No-Show trips were taken 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.

To access the Rides Analyzer Click Reports, then Rides Analyzer.

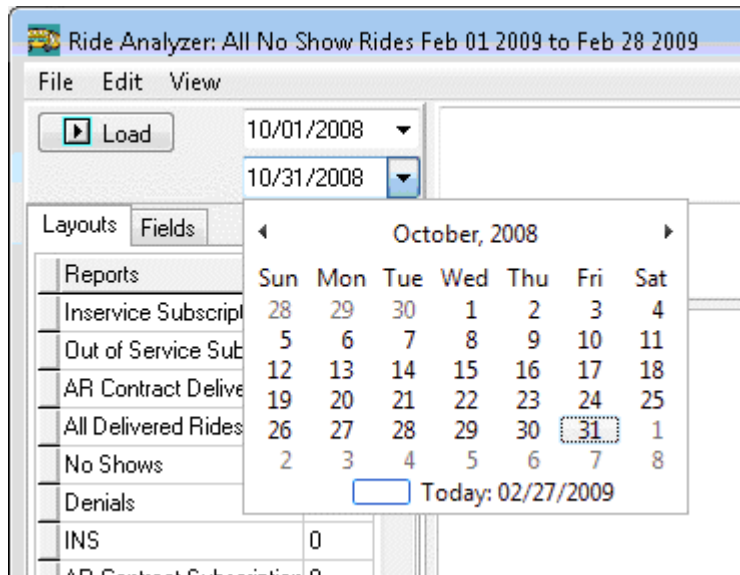
Select File then New to create a new report and give it a name.



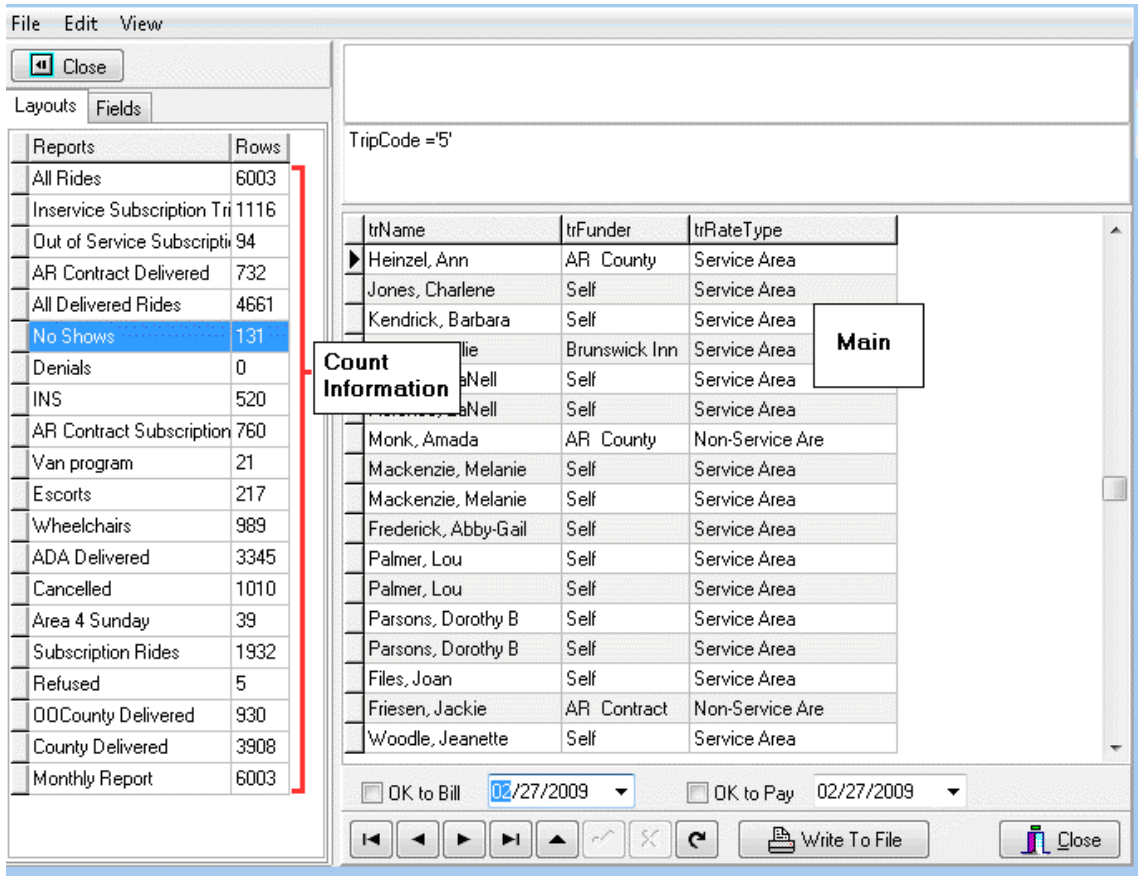
Enter a query in the query field. In this case we want to know all of the No Show trips. A trip's status is set by a value called TripCode. A TripCode of 4 means a Delivered trip, 5 means No Show.



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



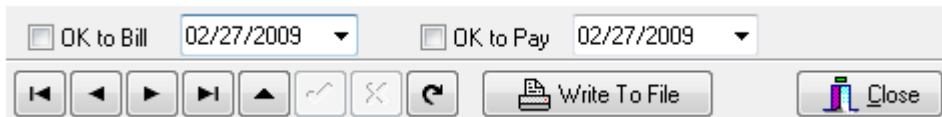
After selecting the start and end date, click the load button and Rides Analyzer will load the data for our new query along with any other queries we have previously created. Once the data has loaded, the number of results for each query will be displayed in the Layouts tab.



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.

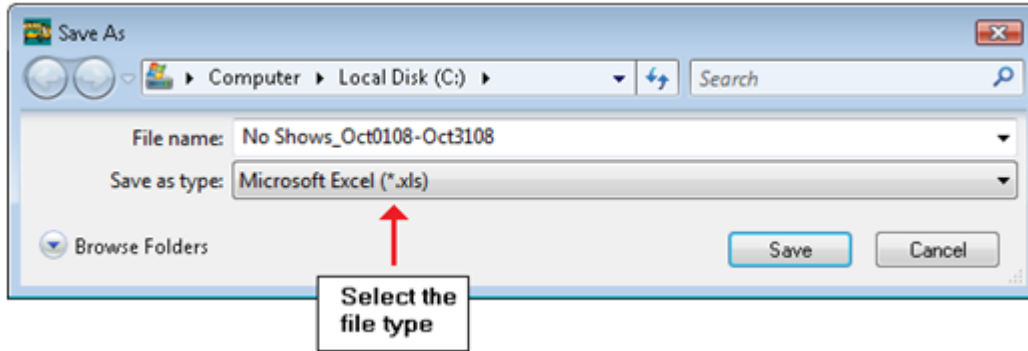
Double clicking a row in the main results window opens the Trip Ticket corresponding to that record. From there we can edit any of the data for that trip.

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.

Generally you will want to save the file as Microsoft Excel. This allows you to open the file in Excel and format the data as needed.



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. Watch the video

Click Reports then Mileage/Time:

Route	Driver	Vehicle	Event	Date & Time	Odometer	Miles	Hours
Wiley	Frank, Brian	15 02 Ford Aero	End Service	02/29/09 1600	147521	end	sta
Wiley	Frank, Brian	15 02 Ford Aero	Non-Revenue	02/28/09 1540	147514	7.0	0.0
Wiley	Frank, Brian	15 02 Ford Aero	Revenue	02/28/09 1400	147490	24.0	1.0
Wiley	Frank, Brian	15 02 Ford Aero	End Service	02/28/09 1300	147490	0.0	1.0
Wiley	Frank, Brian	15 02 Ford Aero	Revenue	02/28/09 0800	147440	50.0	5.0
Wiley	Frank, Brian	15 02 Ford Aero	Non-Revenue	02/28/09 0700	147433	7.0	1.0
Wiley	Frank, Brian	15 02 Ford Aero	End Service	02/27/09 1600	147433	0.0	15.0
Wiley	Frank, Brian	15 02 Ford Aero	Non-Revenue	02/27/09 1525	147424	9.0	0.0
Wiley	Frank, Brian	15 02 Ford Aero	Revenue	02/27/09 1400	147403	21.0	1.0
Wiley	Frank, Brian	15 02 Ford Aero	End Service	02/27/09 1300	147403	0.0	1.0
Wiley	Frank, Brian	15 02 Ford Aero	Revenue	02/27/09 0751	147349	54.0	5.0

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".

Log Odometer and Time

Display Controls
Organize By: Select From: To: Route: Wiley 02/01/09 02/28/09

Delete Row Insert Row Update Row

Route	Vehicle	Driver	Event	Date	Time	Odometer
Wiley	15 02 Ford Aero Tech	Freezer, Brian	Non-Revenue	02/27/08	0700	147236.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	End Service	02/27/09	1300	147341.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	Non-Revenue	02/27/09	0700	147332.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	Revenue	02/27/09	1300	147302.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	End Service	02/27/09	1300	147302.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	Revenue	02/27/09	0758	147246.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	Non-Revenue	02/27/09	0700	147236.00
Wiley	6 97 Ford E-350	Abbott, Wayne	End Service	02/24/09	1315	284891.00
Wiley	6 97 Ford E-350	Abbott, Wayne	Non-Revenue	02/24/09	1247	284886.00
Wiley	6 97 Ford E-350	Abbott, Wayne	Revenue	02/24/09	0908	284834.00
Wiley	6 97 Ford E-350	Abbott, Wayne	Non-Revenue	02/24/09	0800	284827.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	End Service	02/22/09	1600	147236.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	Non-Revenue	02/22/09	1527	147228.00
Wiley	15 02 Ford Aero Tech	Frank, Brian	Revenue	02/22/09	1400	147205.00

Close

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.

Reference Documents

Sample Client Information Sheet

Sample Customer Information Sheet

Thank you for riding _____. We're going to be using a new software system, Easy Rides®, to help us do a better job serving you and other riders. One of the improvements will be to offer quicker trip scheduling, because the system stores each customer's data for easy reference. Please take a few minutes to complete this form, so we can make trip scheduling easy for you in the future.

FIRST NAME: _____ LAST NAME: _____

ADDRESS: _____ APT #: _____

CITY, STATE, ZIP: _____

PHONE NUMBER: (_____) _____

BIRTHDATE: _____ YEAR: _____

MEDICAID #: _____

If you needed help or had an emergency we'd like to call a person you choose.

CONTACT NAME: _____

CONTACT PHONE: (_____) _____

Select all that apply:

GENDER: FEMALE MALE

RACE: WHITE HISPANIC AFRICAN-AMERICAN OTHER, _____

DO YOU USE: WHEELCHAIR WALKER OR CANE ATTENDANT

SERVICE ANIMAL HEARING AID OR DEVICE NO ASSISTANCE

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY. IF YOU HAVE ANY QUESTIONS OR COMMENTS PLEASE CALL _____

Sample Manifests

There are many sample manifests to choose from. These are stored in the system, or a new manifest can be tailored to meet your needs.

Portrait – 2 Column Client name

Portrait – 2 Column Pickup Time

Portrait – Page Width

Portrait – Page Width With Header

Printed Documentation

- Portrait – Page Width With Headers 2
- Portrait - Page Width With Signature
- Portrait – Page Width Without Directions
- Landscape 2 – Active Intervals
- Landscape 2 – Active With Header
- Landscape 2 – Fixed Intervals
- Landscape 2 – Fixed With Header
- Landscape 3 – Fixed With Header
- Landscape – Active Intervals
- Landscape – Fixed Intervals
- Landscape – Stops Manifest

Portrait – 2 Column Pickup Time

Amadela, Bob

Manifest for: Tuesday, Jan 13

Route: Daisy; Vehicle: #16 16 03 Ford Aero Tech.

Printed: Jan 12 at 1616

BREAK. BREAK: Amb-E: (0) (555)123-4567
 0700 Gold Country Telecare (13457 Colfax Hwy) :PU:
 0720 Gold Country Telecare (13457 Colfax Hwy) :
 NA: \$0.00; NA DO:
 NA

CARNEY, JOHN: Amb-E: (1) (555)123-4567
 0735 10511 Bragg Ave : Rockwood PU:
 0900 Pride (12451 Loma Rica Dr) ; Loma Rica
 Direct Bill: \$2.00; NA DO:
 NA

KIDWELL, CORINNE: Amb-E: (1) (555)123-4567
 0735 10511 Bragg Ave : Rockwood PU:
 0900 Pride (12451 Loma Rica Dr) ; Loma Rica
 Direct Bill: \$2.00; NA DO:
 NA

HAWKINS, JAMES: Amb-E: (1) (555)123-4567
 0755 11195 Alpine Ln : Sierra Pines PU:
 0900 Pride (12451 Loma Rica Dr) ; Loma Rica
 Direct Bill: \$2.00; NA DO:
 CAN BE LEFT ALONE

Portrait – 2 Column Client name

Amadela, Bob Manifest for: Tuesday, Jan 13
 Route: Daisy; Vehicle: #16 16 03 Ford Aero Tech. Printed: Jan 12 at 1622

BREAK, BREAK: Amb-E: (0) (555)123-4567
 0700 Gold Country Telecare (13457 Colfax Hwy) :PU:
 0720 Gold Country Telecare (13457 Colfax Hwy) :
 NA: \$0.00; NA DO:
 NA

BREAK, BREAK: Amb-E: (0) (555)123-4567
 1545 Gold Country Telecare (13457 Colfax Hwy) :PU:
 1600 Gold Country Telecare (13457 Colfax Hwy) :
 NA: \$0.00; NA DO:
 NA

CARNEY, JOHN: Amb-E: (1) (555)123-4567
 0735 10511 Bragg Ave : Rockwood PU:
 0900 Pride (12451 Loma Rica Dr) ; Loma Rica
 Direct Bill: \$2.00; NA DO:
 NA

HAWKINS, JAMES: Amb-E: (1) (555)123-4567
 0755 11195 Alpine Ln : Sierra Pines PU:
 0900 Pride (12451 Loma Rica Dr) ; Loma Rica
 Direct Bill: \$2.00; NA DO:
 CAN BE LEFT ALONE

Portrait – Page Width

Amadela, Bob
 Route: Daisy; Vehicle: 16 03 Ford Aero Tech

Manifest For: Tue Jan 13
 Printed On: Mon Jan 12

Break, Break
 07:00 Gold Country Telecare (13457 Colfax Hwy)
 07:20 Gold Country Telecare (13457 Colfax Hwy)
 NA
 PU: (13483 Colfax Hwy)
 DO: (13483 Colfax Hwy)

Amb-E (0) (555)123-4567 NA
 La Barr Meadows NA
 La Barr Meadows

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Carney, John
 07:35 10511 Bragg Ave
 09:00 Pride (12451 Loma Rica Dr)
 NA
 PU: (10511 Bragg Ave)
 DO: (12451 Loma Rica Dr)

Amb-E (1) (555)123-4567 Direct Bill
 Rockwood NA
 Loma Rica

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Kidwell, Corinne
 07:35 10511 Bragg Ave
 09:00 Pride (12451 Loma Rica Dr)
 NA
 PU: (10511 Bragg Ave)
 DO: (12451 Loma Rica Dr)

Amb-E (1) (555)123-4567 Direct Bill
 Rockwood NA
 Loma Rica

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Portrait – Page Width Without Directions

Amadela, Bob

Route: Daisy, Vehicle: 16 03 Ford Aero Tech

Manifest For: Tue Jan 13

Printed On: Mon Jan 12

Break, Break

07:00 Gold Country Telecare (13457 Colfax Hwy)
 07:20 Gold Country Telecare (13457 Colfax Hwy)
 NA

Amb-E (0) (555)123-4567 NA
 La Barr Meadows NA
 La Barr Meadows

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Carney, John

07:35 10511 Bragg Ave
 09:00 Pride (12451 Loma Rica Dr)
 NA

Amb-E (1) (555)123-4567 Direct Bill
 Rockwood NA
 Loma Rica

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Kidwell, Corinne

07:35 10511 Bragg Ave
 09:00 Pride (12451 Loma Rica Dr)
 NA

Amb-E (1) (555)123-4567 Direct Bill
 Rockwood NA
 Loma Rica

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Portrait – Page Width With Header

Amadela, Bob

Route: Daisy, Vehicle: 16 03 Ford Aero Tech

Manifest For: Tue Jan 13

Printed On: Mon Jan 12

Time In:	Time Out:	Total Time:	Pink:	Green:
Mileage Start:	Mileage End:	Total Miles:	Blue:	White:
Gallons Fuel:		Total Cash:	Yellow:	

Break, Break

07:00 Gold Country Telecare (13457 Colfax Hwy)
 07:20 Gold Country Telecare (13457 Colfax Hwy)
 NA
 PU: (13483 Colfax Hwy)
 DO: (13483 Colfax Hwy)

Amb-E (0) (555)123-4567 NA
 La Barr Meadows NA
 La Barr Meadows

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Carney, John

07:35 10511 Bragg Ave
 09:00 Pride (12451 Loma Rica Dr)
 NA
 PU: (10511 Bragg Ave)
 DO: (12451 Loma Rica Dr)

Amb-E (1) (555)123-4567 Direct Bill
 Rockwood NA
 Loma Rica

Start: _____ Pickup: _____ Drop Off: _____ End: _____

Portrait – Page Width With Headers 2

Amadela, Bob

Route: Daisy; Vehicle: 16 03 Ford Aero Tech

Manifest For: Tue Jan 13

Printed On: Mon Jan 12

Time In:	Time Out:	Total Time:	Pink:	Green:
Mileage Start:	Mileage End:	Total Miles:	Blue:	White:
Gallons Fuel:		Total Cash:	Yellow:	

Break, Break

07:00 Gold Country Telecare (13457 Colfax Hwy)

Amb-E (0) (555)123-4567

NA

07:20 Gold Country Telecare (13457 Colfax Hwy)

La Barr Meadows

NA

NA

PU: (13483 Colfax Hwy)

DO: (13483 Colfax Hwy)

Carney, John

07:35 10511 Bragg Ave

Amb-E (1) (555)123-4567

Direct Bill

09:00 Pride (12451 Loma Rica Dr)

Rockwood

NA

NA

PU: (10511 Bragg Ave)

DO: (12451 Loma Rica Dr)

Portrait - Page Width With Signature

Amadela, Bob

Shift Start: _____

Manifest For: Tue Jan 13

Route: Daisy; Vehicle: 16 03 Ford Aero Tech

Printed On: Mon Jan 12

Odom Start: _____ Odom Stop: _____

Break, Break

07:00 Gold Country Telecare (13457 Colfax Hwy)

Amb-E (0) (555)123-4567

Cancel

07:20 Gold Country Telecare (13457 Colfax Hwy)

La Barr Meadows

No Show

NA

La Barr Meadows

Job Number: _____

Signature: _____

Depart Yard: _____ Arrive/Depart PU: _____ / _____ Deliver: _____ Arrive Yard: _____

Carney, John

07:35 10511 Bragg Ave

Amb-E (1) (555)123-4567

Cancel

09:00 Pride (12451 Loma Rica Dr)

Rockwood

No Show

NA

Loma Rica

Job Number: _____

Signature: _____

Depart Yard: _____ Arrive/Depart PU: _____ / _____ Deliver: _____ Arrive Yard: _____

Landscape – Active Intervals

Amadela, Bob

Manifest For: Tue Jan 13

Route: Daisy; Vehicle: 16 03 Ford Aero Tech

Printed On: Mon Jan 12

07:00 / 07:20	Break, Break	Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA	0	Amb-E
		Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA		(555)123-4567
NA						
07:35 / 09:00	Carney, John	10511 Bragg Ave	Rockwood	Direct Bill	1	Amb-E
		Pride (12451 Loma Rica Dr)	Loma Rica	NA		(555)123-4567
NA						
07:35 / 09:00	Kidwell, Corinne	10511 Bragg Ave	Rockwood	Direct Bill	1	Amb-E
		Pride (12451 Loma Rica Dr)	Loma Rica	NA		(555)123-4567
NA						
07:55 / 09:00	Hawkins, James	11195 Alpine Ln	Sierra Pines	Direct Bill	1	Amb-E
		Pride (12451 Loma Rica Dr)	Loma Rica	NA		(555)123-4567
CAN BE LEFT ALONE						
12:45 / 13:45	Lunch, Lunch	Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA	0	Amb-E
		Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA		(555)123-4567
NA						
15:05 / 15:25	Kidwell, Corinne	Pride (12451 Loma Rica Dr)	Loma Rica	Direct Bill	1	Amb-E
		10511 Bragg Ave	Rockwood	NA		(555)123-4567
NA						
15:45 / 16:00	Break, Break	Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA	0	Amb-E
		Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA		(555)123-4567
NA						

Landscape – Fixed Intervals

Amadela, Bob

Manifest For: Tue Jan 13

Route: Daisy; Vehicle: 16 03 Ford Aero Tech

Printed On: Mon Jan 12

07:00 / 07:20	Break, Break	Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA	0	Amb-E
		Gold Country Telecare (13457 Colfax Hwy)	La Barr Meadows	NA		(555)123-4567
NA						
07:15						
NA						
07:35 / 09:00	Carney, John	10511 Bragg Ave	Rockwood	Direct Bill	1	Amb-E
		Pride (12451 Loma Rica Dr)	Loma Rica	NA		(555)123-4567
NA						
07:35 / 09:00	Kidwell, Corinne	10511 Bragg Ave	Rockwood	Direct Bill	1	Amb-E
		Pride (12451 Loma Rica Dr)	Loma Rica	NA		(555)123-4567
NA						
07:55 / 09:00	Hawkins, James	11195 Alpine Ln	Sierra Pines	Direct Bill	1	Amb-E
		Pride (12451 Loma Rica Dr)	Loma Rica	NA		(555)123-4567
CAN BE LEFT ALONE						

Landscape 2 – Active Intervals

Amadela, Bob	Daisy	16 03 Ford Aero Tech	Tue Jan 13	PrintCode/TripNote	Page#: 1
PU/DO Time	Name/Fare	PU/DO Address	Status/Phone	PU/DO Time&Odom	
0700 / 0720	Break, Break	Gold Country Telecare (13457 Colfax Hwy)	Amb-E (0)	NA	/NA
	NA / 0.00	Gold Country Telecare (13457 Colfax Hwy)	(555)123-4567		
0735 / 0900	Carney, John	10511 Bragg Ave	Amb-E (1)	NA	/NA
	Direct Bill / 2.00	Pride (12451 Loma Rica Dr)	(555)123-4567		
0735 / 0900	Kidwell, Corinne	10511 Bragg Ave	Amb-E (1)	NA	/NA
	Direct Bill / 2.00	Pride (12451 Loma Rica Dr)	(555)123-4567		
0755 / 0900	Hawkins, James	11195 Alpine Ln	Amb-E (1)	NA	/ CAN BE LEFT ALONE
	Direct Bill / 2.00	Pride (12451 Loma Rica Dr)	(555)123-4567		
1245 / 1345	Lunch, Lunch	Gold Country Telecare (13457 Colfax Hwy)	Amb-E (0)	NA	/NA
	NA / 0.00	Gold Country Telecare (13457 Colfax Hwy)	(555)123-4567		
1505 / 1525	Kidwell, Corinne	Pride (12451 Loma Rica Dr)	Amb-E (1)	NA	/NA
	Direct Bill / 2.00	10511 Bragg Ave	(555)123-4567		
1545 / 1600	Break, Break	Gold Country Telecare (13457 Colfax Hwy)	Amb-E (0)	NA	/NA
	NA / 0.00	Gold Country Telecare (13457 Colfax Hwy)	(555)123-4567		

Landscape 2 – Fixed Intervals

Amadela, Bob		Daisv	16 03 Ford Aero Tech		Tue Jan 13		Page#: 1
PU/DO Time	Name/Fare	PU/DO Address	Status/Phone	PU/DO Time&Odom	PrintCode/TripNote		
0700 / 0720	Break, Break NA / 0.00	Gold Country Telecare (13457 Colfax H Gold Country Telecare (13457 Colfax H	Amb-E (0) (555)123-4567		NA / NA		
0715							
0735 / 0900	Carney, John Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
0735 / 0900	Kidwell, Corinne Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
0755 / 0900	Hawkins, James Direct Bill / 2.00	11195 Alpine Ln Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / CAN BE LEFT ALONE		

Landscape 2 – Active With Header

Amadela, Bob		Daisv	16 03 Ford Aero Tech		Tue Jan 13		Page#: 1
PU/DO Time	Name/Fare	PU/DO Address	Status/Phone	PU/DO Time&Odom	PrintCode/TripNote		
0700 / 0720	Break, Break NA / 0.00	Gold Country Telecare (13457 Colfax H Gold Country Telecare (13457 Colfax H	Amb-E (0) (555)123-4567		NA / NA		
0735 / 0900	Carney, John Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
0735 / 0900	Kidwell, Corinne Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
0755 / 0900	Hawkins, James Direct Bill / 2.00	11195 Alpine Ln Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / CAN BE LEFT ALONE		
1245 / 1345	Lunch, Lunch NA / 0.00	Gold Country Telecare (13457 Colfax H Gold Country Telecare (13457 Colfax H	Amb-E (0) (555)123-4567		NA / NA		
1505 / 1525	Kidwell, Corinne Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
1545 / 1600	Break, Break NA / 0.00	Gold Country Telecare (13457 Colfax H Gold Country Telecare (13457 Colfax H	Amb-E (0) (555)123-4567		NA / NA		

Landscape 2 – Fixed With Header

Amadela, Bob		Daisv	16 03 Ford Aero Tech		Tue Jan 13		Page#: 1
PU/DO Time	Name/Fare	PU/DO Address	Status/Phone	PU/DO Time&Odom	PrintCode/TripNote		
0700 / 0720	Break, Break NA / 0.00	Gold Country Telecare (13457 Colfax H Gold Country Telecare (13457 Colfax H	Amb-E (0) (555)123-4567		NA / NA		
0715							
0735 / 0900	Carney, John Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
0735 / 0900	Kidwell, Corinne Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / NA		
0755 / 0900	Hawkins, James Direct Bill / 2.00	11195 Alpine Ln Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567		NA / CAN BE LEFT ALONE		

Landscape 3 – Fixed With Header

Time:	Begin	First PU	Last DO	End	Gallons Fuel:	Green:	Pink, Non-Med:
Odometer:					Total Cash:	White:	Yellow, Med:
						Blue:	

Amadela, Bob	Daisy	16 03 Ford Aero Tech	Tue Jan 13
PU/DO Time	Name/Fare	PU/DO Address	Status/Phone
0700 / 0720	Break, Break NA / 0.00	Gold Country Telecare (13457 Colfax Hw Gold Country Telecare (13457 Colfax Hw	Amb-E (0) (555)123-4567
0715			
0735 / 0900	Carney, John Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567
0735 / 0900	Kidwell, Corinne Direct Bill / 2.00	10511 Bragg Ave Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567
0755 / 0900	Hawkins, James Direct Bill / 2.00	11195 Alpine Ln Pride (12451 Loma Rica Dr)	Amb-E (1) (555)123-4567

Landscape – Stops Manifest

Time In:	Time Out:	Total Time:	Green:	Blue:
Mileage Start:	Mileage End:	Total Miles:	White:	Yellow:
Gallons Fuel:	Total Cash:		Pink:	
Amadela, Bob	Daisy	16 03 Ford Aero Tech	Manifest Date: Tue, Jan 13 Print Date: Mon, Jan 12	
P/Trip	Name/Address	Status/Phone	Mileage/Trip	Note/Directions
P 07	Break, Break Gold Country Telecare La Barr M	Amb-E (0) (NA) NA, 0.00	(13483 Colfax Hwy)	
D 07	Break, Break Gold Country Telecare La Barr M	Amb-E (0) (NA) NA, 0.00	(13483 Colfax Hwy)	
P 07	Kidwell, Corinne 10511 Bragg Ave Rockwood	Amb-E (1) (NA) Direct Bill/2.00	(10511 Bragg Ave)	
P 07	Carney, John 10511 Bragg Ave Rockwood	Amb-E (1) (NA) Direct Bill/2.00	(10511 Bragg Ave)	
P 07	Hawkins, James 11195 Alpine Ln Sierra Pine	Amb-E (1) (NA) Direct Bill/2.00	CAN BE LEFT ALONE/(11195 Alpine Ln)	

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.

Glossary

B

Batch Schedule: Batch scheduling, or autoscheduling, will automatically assign trips to runs according to parameters established by the scheduler.

Buddies: Buddies are passengers who travel together. Trip tickets can be grouped (buddied) together so when you handle one ticket in the group the other tickets are also selected for the same action, for example a person traveling with an attendant should be grouped.

D

Data Fields: One part of a record in your database; the Last Name is one field in a Client's record.

Database: Files on the server containing all of the tables where the information used by Easy Rides and the utility are stored; Clients, Addresses, Trips, Drivers and many others including tables used to enhance functionality of Easy Rides but normally unseen by the user make up the database.

Delivered Board: Similar in appearance to the Schedule board, (but containing only assigned tickets to routes) this board represents tickets that have been "delivered" by the Driver.

F

Farebox: The driver keeps cash for the trip in the Farebox.

Fields: One part of a record in your database; the Last Name is one field in a Client's record.

Form: Like a paper "form", a visual screen interface to enter information for a record; the Trip Form is an easy way for the user to enter a trip record into the database.

G

Geocode: The process of associating a latitude and longitude to an address

GIS: Geographic Information System – In Easy Rides this refers to the mapping options where addresses are coded (geocoded) with a latitude and longitude (lat/lon) so the location can be pinpointed to an exact spot on the map. This association of lat/lon (geo-coding) allows you to display a client's address, a drivers route or any other address or place on the map with just a click from within Easy Rides.

H

Hot Trips: A trip that is selected in preparation for the next action.

M

Make Hot: To click on the client special needs icon portion of a trip ticket or tickets to select the ticket(s) in preparation for the next action; you might make several trip tickets "hot" to move them from the pool to a route, deliver them, display them on a map, etc.

MapPoint: Microsoft MapPoint is both a technology ("MapPoint Web Service,") and a specific software program created by Microsoft that allows users to view, edit and integrate maps. The software and technology are designed to facilitate the geographical visualization and analysis of either included data or custom data.

P

Planner: The Planner lets you visually look at your schedule so that you can easily see gaps or duplications. It's used as an adjunct to the Dispatch Board.

Pool: A visual area of the schedule board in Easy Rides where trip tickets that do not have a route assigned to them are placed.

R

Route: A Route is a set of trips that can be assigned to any bus and driver.

Route Parameter Replication: Route Parameter replication allows a user to set a day schedule with the same drivers, vehicles, times and constraints as another day schedule.

S

Schedule Board: The main scheduling screen where a specific day's trip tickets are displayed and moved between the stage, pool or routes.

Select this text: To highlight text in a field causing it to display as a blue box with white characters for the purpose of overtyping and replacing with new text or deleting, cutting or copying the selected text.

Sent Board: Similar in appearance to the Schedule board, (but containing only assigned tickets to routes) this board represents tickets that have been "sent" or communicated to the Driver, and (depending on how your agency dispatches or uses the system) passengers that the Driver has on board the vehicle at the moment.

Sent Trips: A sent trip is one that has been "Sent" or communicated to the Driver.

Stage: A visual area of the schedule board in Easy Rides where the user can position unassigned trip tickets. The pool is unique in that the tickets can be "drag and dropped" anywhere within the stage area which may help the user associate some visual meaning to the tickets in the stage based on their position.

T

Trip Ticket: A reservation for a client ride.

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