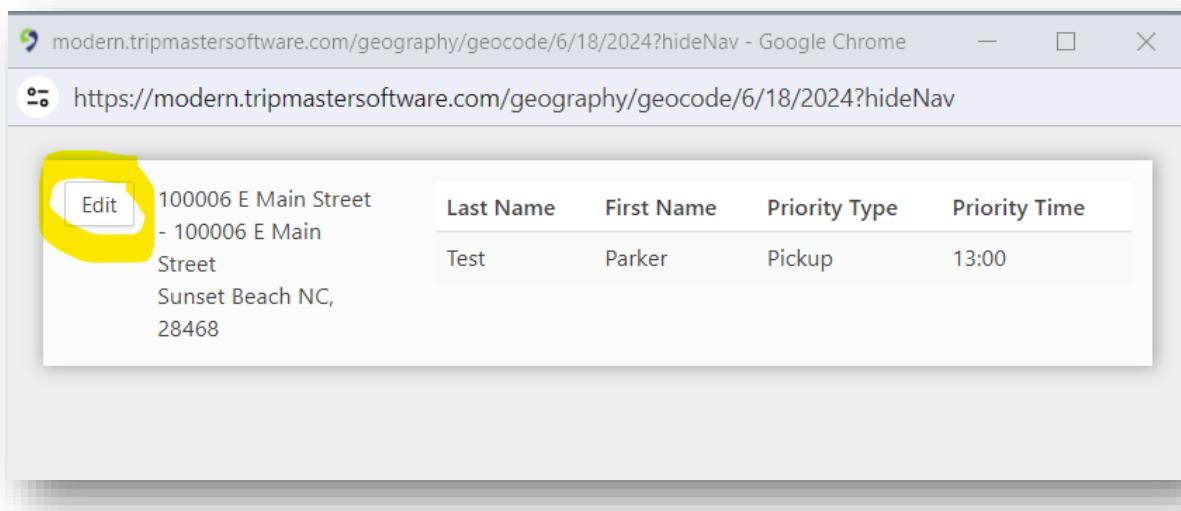




## TripScheduling

### Preparing to TripSchedule:

- Ensure that all trips for the day to be scheduled are on your Daily Schedule, either in the Holding Pen or scheduled to whichever Routes you have assigned them to manually.
- **Geocode** your day, fixing any errors that are encountered or manually geocoding, as necessary.
- To Fix a Geocoding error, click Edit on any address that appears in the pop-up message. Fix any mistakes you encounter and click Preview on map next to the suggestions to find the correct site.



**Edit Site**

We found some similar addresses online, do you see a match here?

Preview on map	Select location	• Sunset Beach, E Main St, Sunset Beach, NC, 28468, USA
Preview on map	Select location	• E Main St, Sunset Beach, NC, 28468, USA
Preview on map	Select location	• Sunset Beach 8th Street Walkway, E Main St, Sunset Beach, NC, 28468, USA
Preview on map	Select location	• W Main St, Sunset Beach, NC, 28468, USA
Preview on map	Select location	• Sunset Beach Pier, 101 W Main St, Sunset Beach, NC, 28468, USA

**Name**

**Address 1**

**Address 2**

**City**

**State**

**Zip**

**County**

**Site Phone**

**Site Code ?**

Is Urban    Is Hub

Save with no geocode  

**Geocode All**

Manually set location on map

location has not been verified

**esri**

- When you have the correct site, click select location, you should see the accurate address and a green geocoded marker on the map on the right. Then click to save to finish geocoding.

**Edit Site**

Name

**Address 1**

**Address 2**

**City**

**State**

**Zip**

**County**

**Site Phone**

**Site Code ?**

Is Urban    Is Hub

Save  

**Geocode All**

Manually set location on map

location has been verified

**esri**

- For any address that cannot find a geocoded site, you can scroll along the map and manually drop a pin to set a location using the Manually set location on Map button.

**Edit Site**

We found some similar addresses online, do you see a match here?

Preview on map	Select location	1006 E Main St, Sunset Beach, NC, 28468, USA
Preview on map	Select location	Sunset Beach, E Main St, Sunset Beach, NC, 28468, USA

Name: 1006 E Main Street

Address 1: 1006 E Main Street      Address 2:

City: Sunset Beach      State: NC      Zip: 28468      County: Brunswick

Site Phone:      Site Code: R

Is Urban       Is Hub

Save with no geocode       Cancel

**Manually set location on map**

**Geocode All**

**OFF**

**location has not been verified**

North Carolina  
South Carolina  
90-4  
Shal  
Sunset Beach  
Little River  
North Myrtle Beach  
Long Bay  
esri

- Next click **Calculate Direct Drives**. This ensures the system has calculated the direct drive distance mileage between the pick up and drop off locations. This will be the most direct route between locations as calculated by Google Maps.
- Click the **Trip Scheduler Button** to open your scheduling tool.

Common Tasks    Master Pages    Reports    Billing    Utilities    Vehicle Maintenance    Pass Management    User Profile    Help

Current Company: OSHChicago    Current User: ParkerH

Date	Search Text	Provider					
03/21/2024		<input type="checkbox"/> Routes <input type="checkbox"/> Rides <input type="checkbox"/> Holding Pen <input type="checkbox"/> Advanced Filter					
<input type="button" value="AutoSchedule"/> <input type="button" value="TripScheduler (Beta)"/> <input type="button" value="TripCalendar"/> <input type="button" value="TripSync Ride(s)"/> <input type="button" value="Geocode Day"/> <input type="button" value="Calculate Direct Drives"/> <input type="button" value="Refresh"/> <input type="button" value="More Options"/>							
Status	Sync	Route #	Description	Available Times	Driver	Vehicle	Mob
Not Validated	1		Avalon Park 1	07:30-17:30	None	1	WC
Not Validated	2		Avalon Park 2	07:30-17:30	None	2	WC
Not Validated	3		Avalon Park 3	07:30-17:30	None	3	WC
Not Validated	4		Avalon Park 4	07:30-17:30	None	4	WC
Not Validated	5		Avalon Park 5	07:30-17:30	None	5	WC
Not Validated	6		Avalon Park 6	07:30-17:30	None	6	WC

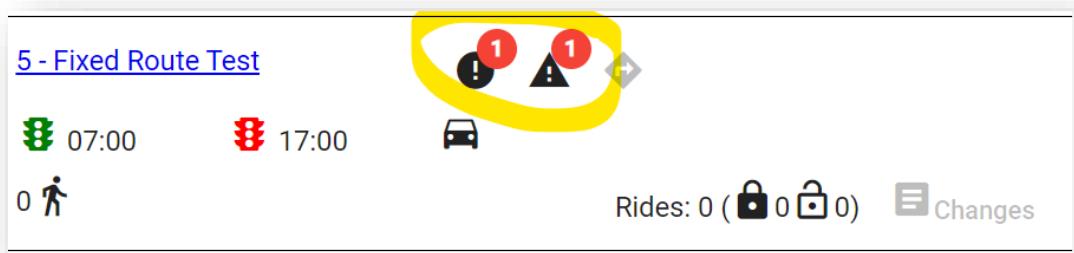
Status    Name    From    Pickup Location    To

**Daily Schedule**  
2024

**Route Validation**

**Subscription Routes**

- Ensure that your **Routes** and **Reservations** are free of any **Errors**.



Route Number	Route Name	Start Time	End Time	Passenger Count	Rides	Changes
1 - Dewey Panthers	1 - Panthers, Dewey	07:00	17:30	4	0 (0 0 0)	Changes
2 - Bob Johnson	2 - Johnson, Bob	07:00	17:30	4	0 (0 0 0)	Changes
3 - Max Smith	3 - Smith, Max	07:00	17:30	4	0 (0 0 0)	Changes
4 - Rodney D	4 - Dangerfield, Rodney	07:00	17:30	4 2	0 (0 0 0)	Changes
5 - Fixed Route Test		07:00	17:00	0	0 (0 0 0)	Changes

Priority Time	Rider Name	Passenger Count	Seat	Seat Based on Provider?
10:00	Richardson, Ada	1	1	✓
10:30	Suspensions, Test Rider	1	1	✓
09:15	Hughett, Clay	1	1	✓
09:15	Hughett, Robert	1	1	✓
11:35	Hughett, Leigh	1	1	✓
08:00	Alpha, Test Rider	1	1	✓
13:00	Bravo, Test Rider	1	1	✓
11:30	Charlie, Test Rider	1	1	✓

- The circle with an exclamation mark indicates a critical error with a Route or Reservation. These must be fixed before the Route or Reservation would be valid for Scheduling.
- The triangle with an exclamation mark indicates a warning, these are less pressing matters and will not prevent scheduling from occurring.
- Click on the indicators to see an error or warning summary.

## Running the TripScheduler

- Once your Routes and Reservations are clear of any errors or warnings you can then run the Trip Scheduler by clicking the **Seat Button** or utilize the filter and toggle tools first to direct your scheduling more specifically.

CTS TripScheduler

5/24/2024

**Routes (7 selected)**

Sort: Route Number (Asc)

4 - Rodney D	07:00	17:30	4 - Dangerfield, Rodney
4	2	1	Rides: 0 ( <input type="button" value="Lock"/> 0 <input type="button" value="Open"/> 0 ) <input type="button" value="Changes"/>

5 - Fixed Route Test	07:00	17:00	4 - Dangerfield, Rodney
0	1	1	Rides: 0 ( <input type="button" value="Lock"/> 0 <input type="button" value="Open"/> 0 ) <input type="button" value="Changes"/>

6 - Validation Test 1	00:01	23:59	4 - Dangerfield, Rodney
0	0	0	Rides: 0 ( <input type="button" value="Lock"/> 0 <input type="button" value="Open"/> 0 ) <input type="button" value="Changes"/>

**Holding Pen (21 selected)**

Sort: Priority Time (asc)

Seat  Seat Based on Provider?

10:00 - Richardson, Ada	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
10:30 - Suspensions, Test ...	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
09:15 - Hughe... Clay	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
09:15 - Hughe... Robert	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
11:35 - Hughe... Leigh	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
08:00 - Alpha, Test Rider	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>

- In order remove certain Drivers or Reservations from a round of scheduling, use the blue toggles switches on the right side of each

CTS TripScheduler

5/24/2024

**Routes (7 selected)**

Sort: Route Number (Asc)

1 - Dewey_Caruthers	07:00	17:30	1 - Caruthers, Dewey
4	1	1	Rides: 0 ( <input type="button" value="Lock"/> 0 <input type="button" value="Open"/> 0 ) <input type="button" value="Changes"/>

2 - Bob Johnson	07:00	17:30	2 - Johnson, Bob
4	1	1	Rides: 0 ( <input type="button" value="Lock"/> 0 <input type="button" value="Open"/> 0 ) <input type="button" value="Changes"/>

3 - Max Smith	07:00	17:30	3 - Smith, Max
4	1	1	Rides: 0 ( <input type="button" value="Lock"/> 0 <input type="button" value="Open"/> 0 ) <input type="button" value="Changes"/>

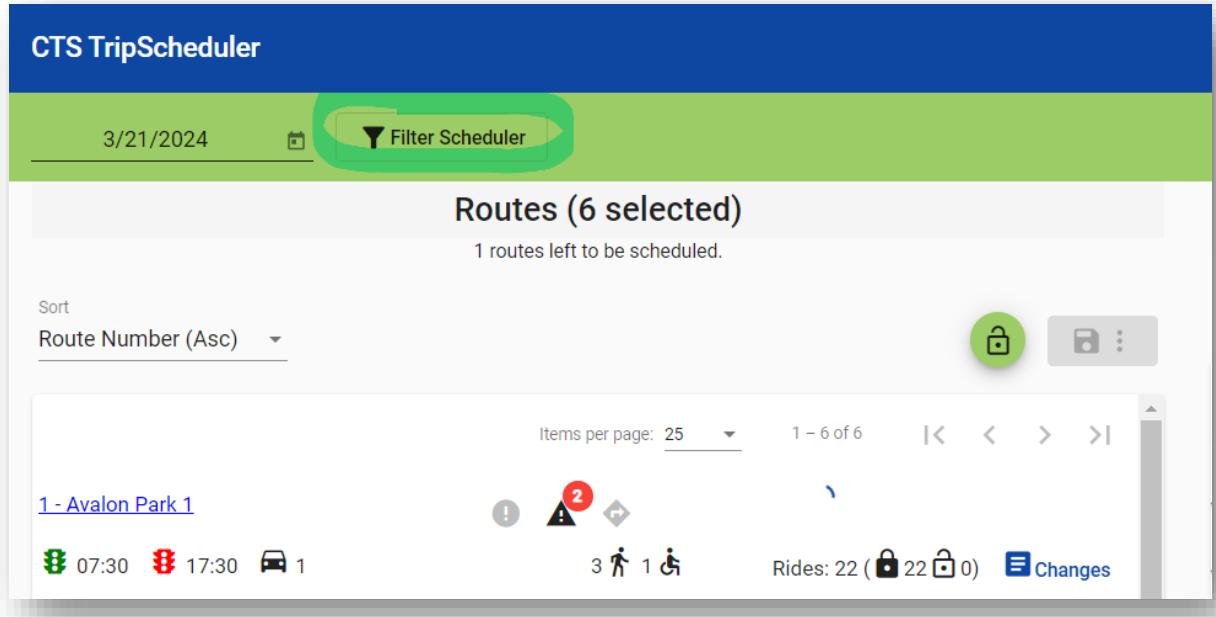
**Holding Pen (21 selected)**

Sort: Priority Time (asc)

Seat  Seat Based on Provider?

10:00 - Richardson, Ada	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
10:30 - Suspensions, Test ...	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
09:15 - Hughe... Clay	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
09:15 - Hughe... Robert	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
11:35 - Hughe... Leigh	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>
08:00 - Alpha, Test Rider	<input type="button" value="Lock"/>	<input type="button" value="Open"/>	<input checked="" type="checkbox"/>

- To filter your routes and reservation Click **Filter Scheduler**.



The screenshot shows the CTS TripScheduler application interface. At the top, a blue header bar displays the title 'CTS TripScheduler'. Below it, a green navigation bar includes a date field '3/21/2024' with a calendar icon, and a button labeled 'Filter Scheduler' with a magnifying glass icon, which is highlighted with a green oval. The main content area has a white background and a title 'Routes (6 selected)'. Below the title, a message says '1 routes left to be scheduled.' A 'Sort' dropdown menu is open, showing 'Route Number (Asc)' with a downward arrow. To the right of the dropdown are three icons: a lock, a save, and a more options menu. Below the dropdown, there are buttons for 'Items per page: 25' (with a dropdown arrow), '1 - 6 of 6', and navigation arrows. A table row is displayed with the text '1 - Avalon Park 1'. To the left of the row are icons for a bus (green), a person (blue), and a car (grey). To the right are icons for a person (blue), a person with a wheelchair (grey), and a bus (green). Below these icons are the times '07:30' and '17:30'. To the right of the row are icons for a lock (green), a bus (green), and a person (blue). The text 'Rides: 22 ( 22 )' is followed by a 'Changes' button. The bottom of the table row has a grey scroll bar.

- Utilizing the Filter, you can refine your scheduling in several ways using the different selections.
- After your Filter selections have been made, click Apply Filters then click on the Seat Button to run the Trip Scheduler.

**Filters**

Use an Existing Filter  Delete Filter

**Route Filters**

Only Selected Routes

Only Scheduled Routes

Min Route Number:

Max Route Number:

Mobilities:

Providers:

Only Show Routes With Errors and Warnings

**Holding Pen Filters**

Only Selected Rides  Only Unseated Rides

Accounts:  Providers:

Purposes:  Priority Type:

Pickup Cities:  Dropoff Cities:

Pickup Counties:  Dropoff Counties:

Mobilities:

- When the trip Scheduler is finished a Change Summary will appear. You can click the green plus marks on the left to expand the data for a summary of ride assignments or click close

**Changes Summary:**

	Plan Changes	Plan Statistics	Feedback		
Route #	Start Time	Break Start Time	End Time	Ride Count	
+	1	07:30 > 08:32	N/A > 09:00	17:30 > 11:27	0 > 2
	2	07:30 > 07:30	N/A > N/A	17:30 > 17:30	0 > 0
	3	07:30 > 07:30	N/A > N/A	17:30 > 17:30	0 > 0
	4	07:30 > 07:30	N/A > N/A	17:30 > 17:30	0 > 0
	5	07:30 > 07:30	N/A > N/A	17:30 > 17:30	0 > 0
	6	07:30 > 07:30	N/A > N/A	17:30 > 17:30	0 > 0

- Check each route by clicking on the drivers' names to inspect each route's ride assignments.

CTS TripScheduler

5/24/2024

Filter Scheduler

Routes (7 selected)

Sort: Route Number (Asc)

**1 - Dewey Caruthers**

07:00 17:30 1 - Caruthers, Dewey 4 Rides: 0 ( 0 0 ) Changes

**2 - Bob Johnson**

07:00 17:30 2 - Johnson, Bob 4 Rides: 0 ( 0 0 ) Changes

**3 - Max Smith**

07:00 17:30 3 - Smith, Max 4 Rides: 0 ( 0 0 ) Changes

- The schedule tab provides a stop-by-stop breakdown of your driver's day.

1 - Robert

Map Assigned Rides **Schedule** Statistics

Scheduled Start: 05:00 Availability Start: 05:00 Break: Break Length: N/A

Scheduled End: 20:00 Availability End: 20:00

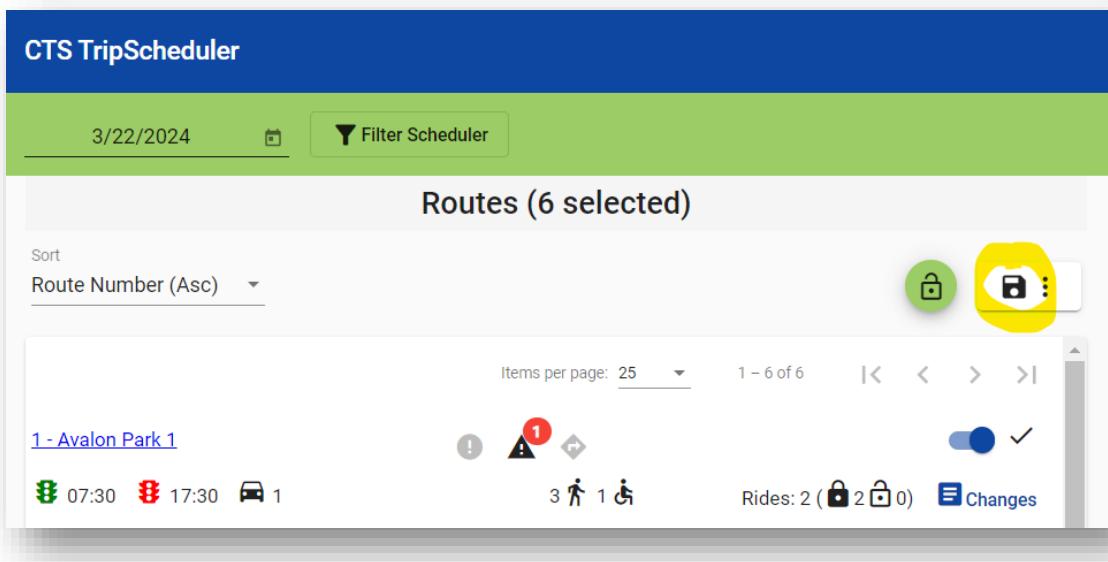
3 passengers 1 wheelchair 0 vehicles

#01Sienna1 - ROBERT CAREY

- Inspect each route carefully to ensure that you are happy with the scheduling. If there are minimal rides that need to be moved manually, it is recommended to make note of these

separately, save the trip scheduler, and then make manual adjustments as necessary on the **Daily Schedule**.

- If there are multiple issues with the first round of scheduling, examine how the rides were seated and think about what variables affect scheduling, i.e. loading times, boarding prep minutes, scheduling flexibility, and capacity. Make changes and adjustments as necessary and run the scheduler again. Often even small changes to a Schedule Profile or the Scheduling Filter can have significant results.
- When you are content with the Trip Scheduler results, click on the Floppy Disk Icon to Save, select Save, a second summary will appear, click save again and you are done.



The screenshot shows the CTS TripScheduler application. At the top, it says 'CTS TripScheduler'. Below that is a green header bar with the date '3/22/2024' and a 'Filter Scheduler' button. The main area is titled 'Routes (6 selected)'. It shows a table with one row, '1 - Avalon Park 1'. The row includes icons for a bus, a driver, a person, a wheelchair, and a car. It also shows times '07:30' and '17:30', and a count of '1'. At the bottom of the table, it says 'Rides: 2 ( 2 0 )' and 'Changes'. There are also 'Sort' and 'Route Number (Asc)' dropdowns, and a toolbar with icons for lock, save (highlighted with a yellow circle), and more. The bottom right shows page navigation and a checkbox.

- Any trips left unseated would need to be manually seated, if possible, changed to another appointment time, or would need to be rerouted to another transportation provider.

### TripScheduler Factors

1. Vehicle Capacity and Boarding preparation minutes
2. Loading and Unloading Time
3. Pickup and drop off windows in Schedule Profile
4. Special Assistance needs
5. Driver required special assistance needs
6. Vehicle required Special assistance needs
7. Driver Breaks
8. Route availability- is the route available early or late enough to accommodate rides?
9. Driver Excluded Riders
10. Garaging max distance
11. Calculated drive time

