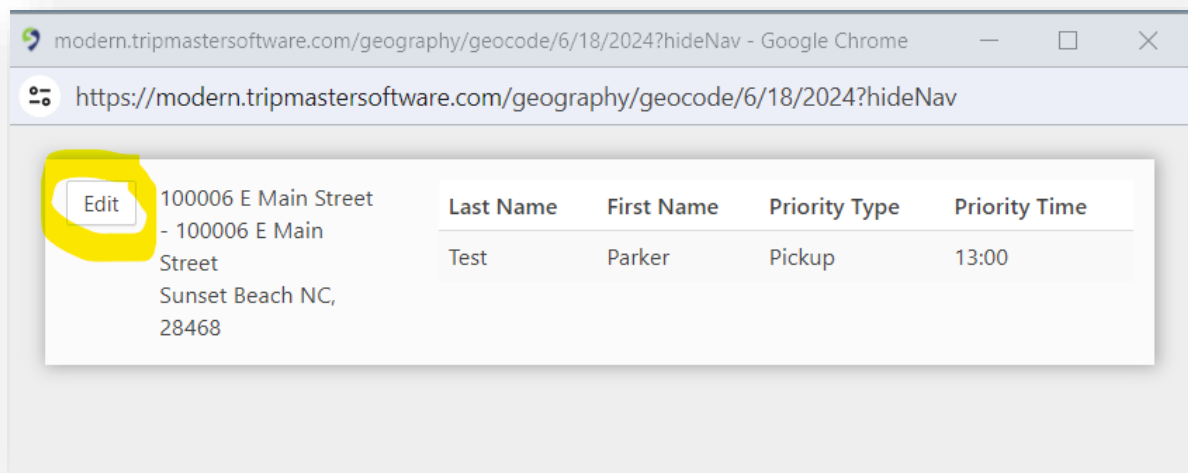




TripScheduling

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 Geocode All

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
100006 E Main Street

Address 1
100006 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 OFF

✗ location has not been verified

- 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 Geocode All

Name
1006 E Main Street

Address 1
1006 E Main St

Address 2

City
Sunset Beach

State
NC

Zip
28468

County
Brunswick County

Site Phone

Site Code ?
R

☐ Is Urban ☐ Is Hub

[✓ Save](#) [✗ Cancel](#)

Manually set location on map OFF

✓ location has been verified

- 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 Geocode All

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

Manually set location on map

location has not been verified

North Carolina South Carolina

904

Shal

Little River

Sunset Beach

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: 03/21/2024 Search Text: Search Clear Search Text Provider:

AutoSchedule **TripScheduler (Beta)** TripCalendar TripSync Ride(s) **Geocode Day** **Calculate Direct Drives** Refresh 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 Pickup Location To

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

5 - Fixed Route Test

07:00 17:00

0 Rides: 0 () Changes

Sort: Route Number (Asc)

1 - Dewey Canuthers

2 - Bob Johnson

3 - Max Smith

4 - Rodney D

5 - Fixed Route Test

Sort: Priority Time (asc)

Items per page: 25 1 - 21 of 21

10:00 - Richardson, Ada

10:30 - Suspensions, Test Rider

09:15 - Hughett, Clay

09:15 - Hughett, Robert

11:35 - Hughett, Leigh

08:00 - Alpha, Test Rider

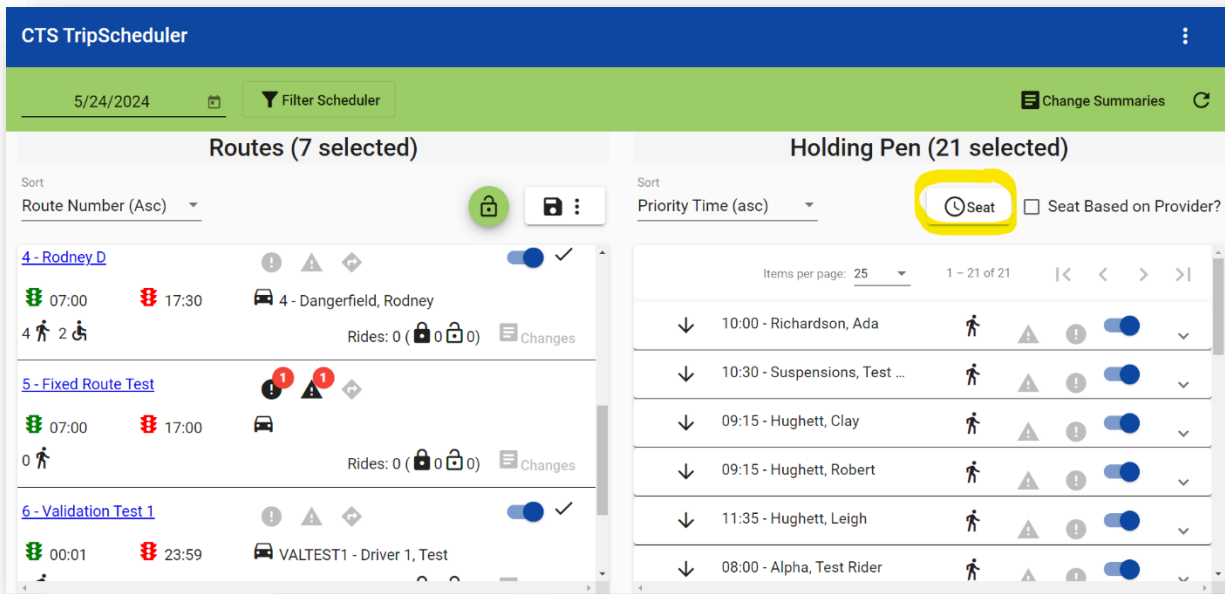
13:00 - Bravo, Test Rider

11:30 - Charlie, Test Rider

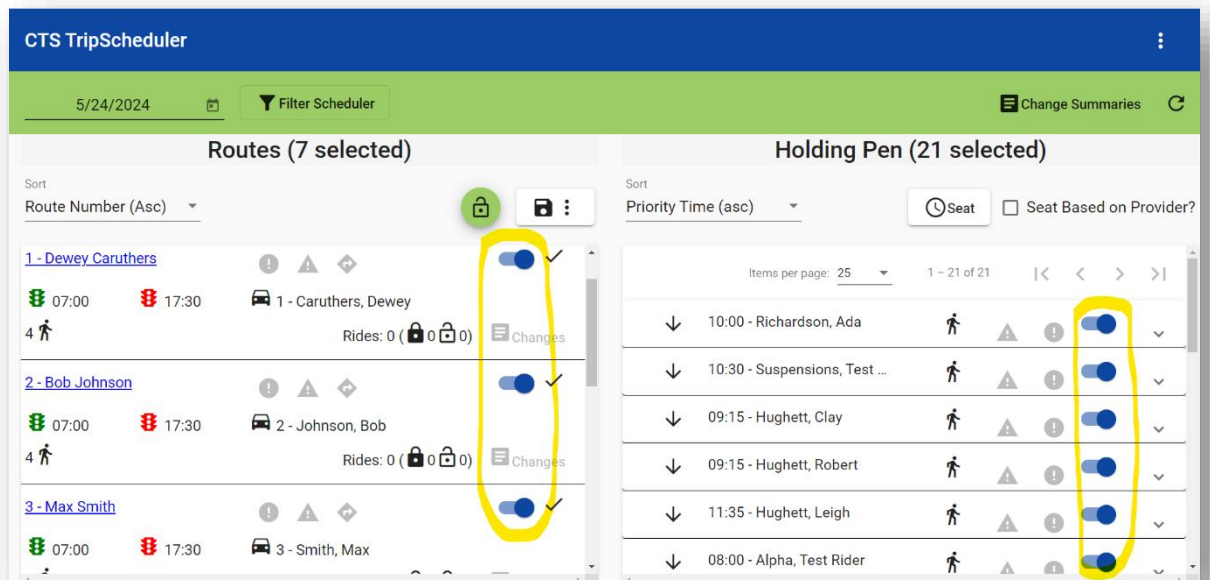
- The circle with an exclamation mark indicates a critical error with a Route or Reservation. These must be fixed before the Route or Reservation would be valid for Scheduling.
- The triangle with an exclamation mark indicates a warning, these are less pressing matters and will not prevent scheduling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

Running the TripScheduler

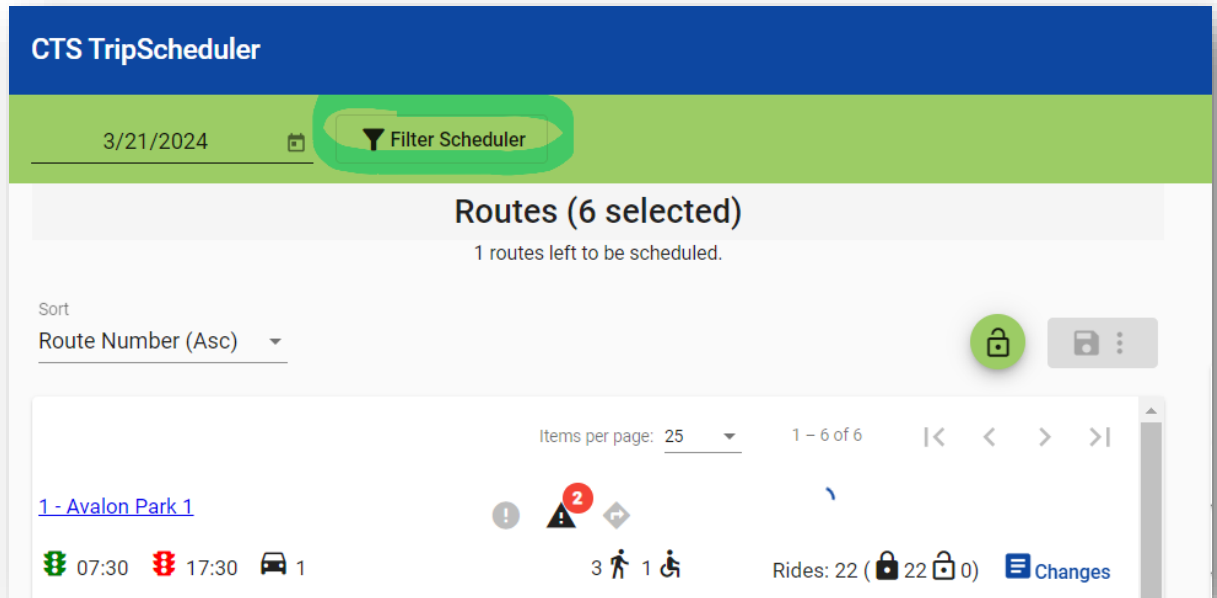
- Once your Routes and Reservations are clear of any errors or warnings you can then run the Trip Scheduler by clicking the **Seat Button** or utilize the filter and toggle tools first to direct your scheduling more specifically.



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



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



- 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

Filter Name

Delete Filter

Clear Filters

Route Filters

Only Selected Routes

Only Scheduled Routes

Min Route Number: 1

Max Route Number: 7

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:

Cancel

Save and Apply Filters

Apply Filters

- 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:

Close

	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

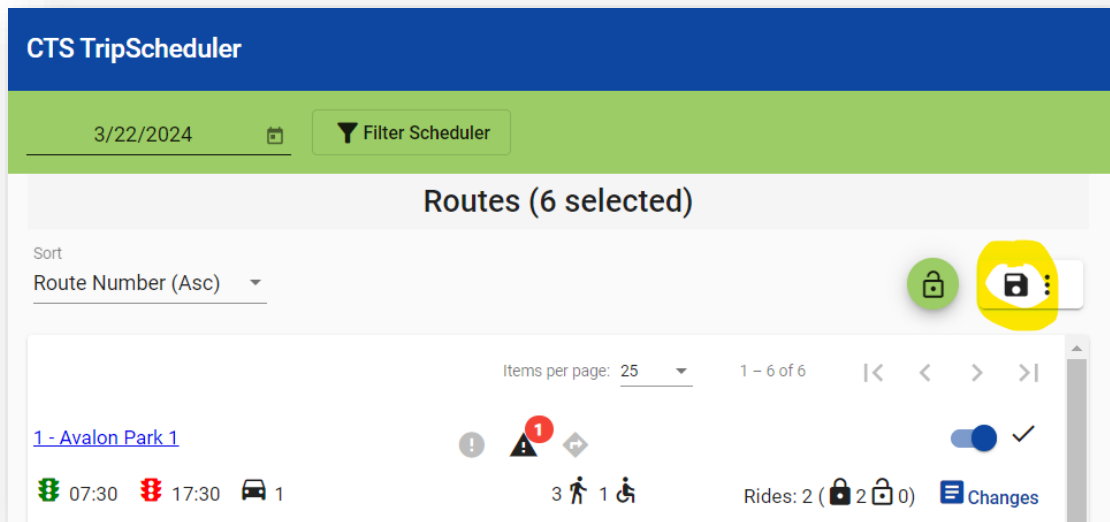
 : Scheduled Start: 05:00  : Break:  : Scheduled End: 20:00  3  1  0 

 : Availability Start: 05:00  : Break Length: N/A  : Availability End: 20:00  : #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.



- 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

