

## *Appendix B*

# **How to Use the Bid Allowance Automatic Assignment Method**

This appendix describes how the process of the bid allowance with the automatic assignment method works. This is a general description of the process. See the referrals in this appendix for other chapters in the T.O.M. manuals for additional details.

Generally, the Bid Allowance Method for automatically assigning driver for field trips basically is a method where drivers are given an allowance of points that he / she can use to bid on field trip assignments. This allowance can be given yearly, quarterly, monthly, weekly – how ever often your organization sees fit. On a regular basis the field trips available for driver assignments are then posted and the drivers can bid on these field trips by specifying how many of their allowance points they bid for a that particular field trip assignment. When T.O.M. automatically assigns the drivers to field trips T.O.M. will find the driver that has bid the highest number of points without conflicts and award that driver the field trip assignment and subtract the drivers bid from that driver's remaining allowance of bid points.

To assist your organization to implement this method of assigning drivers to field trips T.O.M. has the following features:

- A bid allowance field for each employee.
- A field trip bid entry method by field trip.
- A field trip bid entry method by driver.
- Automatic assignment of driver's logic that will find the driver with the highest bid and no conflicts and assign that driver to the field trip.
- An employee bid adjustment routine that allows you to either zero out all driver's bid allowances or adjust all driver's bid allowance up or down by a specified number of points.

To use the Bid Allowance Method of automatically assigning your drivers to field trip you must first set the Automatic Assignment Method to 'Bid' in the District Options screen (Figure B-1).



**District Options**

General Assignment Billing Other

► Automatic Assignment Method: Bid

Check for conflicts outside of schedule: ☒ Conflict Hours Range: 0.25 Mass Assign Order: Date

Within Schedule Date Range Recalculating

Hours Averaging Options:

Average Hours Within the Schedule: ☒ How to break ties within a schedule: Total Hours

Rotation Options:

Rotation Order: Seniority

**Overtime**

Allow: Weekly: ☒ Daily: ☒ Hours Limit: 40 10

Use of Employee Route Hours

☒ Don't use ☐ Prevent conflicting field trips ☐ Subtract overlap time from O.T. ☐ Both - prevent conflicting trips and if a trip is found overlapping subtract from O.T.

Standard Trip Route Conflict Range: 0.25 Drop / Return Trip Route Conflict Range: 0.5

Custom Fields Garage Checklist Exit

Figure B-1. Automatic Assignment Method Set to 'Bid'

Set Automatic Assignment Method to 'Bid'.

## ENTERING DRIVER BIDS FOR FIELD TRIPS

After you have setup your T.O.M. software to enter trips and have entered your field trips you may then enter your driver bids for field trips. There are two ways to enter driver bids for field trips: 1. By Field Trip or 2. By Employee. Let's look at these two methods one at a time.

### ENTERING DRIVER BIDS FOR FIELD TRIPS BY FIELD TRIP.

1. Complete normal trip processing, which includes entering driver's bids for trips. From the Detailed Field Trip screen, click the Trip Bids button (Figure B-2).



**T.O.M. - Transportation Operations Manager**

**Field Trip** Field Trip Request #: 2123

General Instructions Assignment Billing Other

Field Trip #: 10159

Request Date: 12/7/1999 Drop / Return: ☐

Customer: 56 ECHO MOUNTAIN ELEM.

Contact: Kyle Shappee

Destination: 137 CHAPPARAL PARK

Out of Town: ☐ HAYDON & CHAPPARAL

Split Fund: 8

Dates / Times Passengers / Miles / Purpose

# of Adults : 50

# of Students: 55

# of Handicap: 0

Estimated Time: 4.50

Estimated Miles: 30.00

Purpose :

Calc

OK Save Addit. Trip Print Print Bills Bill Cancel Trip Trip Exit  
Trip Dates Drivers Info Ticket Est. and Trip Trip Bids

Figure B-2. Click Trip Bids to Enter Driver's Bids

The Bid Search screen is displayed (Figure B-3).

Click the Trip Bids button.



- Click the New button each time you wish to add a driver's bid.

Click the New button.

Figure B-3. The Bid Search Screen

The Field Trip Bid screen is displayed (Figure B-4).

Figure B-4. The Field Trip Bid Screen

- Find the employee and enter the bid points in the Bid Amount field (Figure B-5). Click the OK button.



**Field Trip Bid**

Trip Num: 10159 BID #: 63

Customer: ECHO MOUNTAIN ELEM.

Destination: CHAPPARAL PARK Departure: 9/15/00

Purpose:

Employee: 103 COCI, KATHLEEN

BID Amount: 50

Request Date: 2/25/00

OK Exit

Click the OK button.

Figure B-5. The Field Trip Bid Screen with Bid Amount Entered.

The employees and their bids are displayed in the Bid Search screen (Figure B-5).

**BID SEARCH**

**Bid Search**

Trip #: 10159 Employee #:

Employee Last Name:

Employee	Bid#	Trip#	Points	Request	Status
COCI, KATHLEEN	63	10159	50.00	2/25/00	BID

Find New Edit Delete Exit

Figure B-6. The Bid Search Screen with Driver's Bid Added

4. When you have entered all the bids, click the Exit button.



5. After you have entered all of the driver bids you may instruct T.O.M. to automatically assign the field trip. *For more information on this see Chapter 2 in your User's Guide.*

#### ENTERING DRIVER BIDS FOR FIELD TRIPS BY EMPLOYEE

This method of entering driver bids is handy when you have bids for many trips for a single driver to enter into T.O.M.

1. Select an employee that you wish to enter driver bids for and click the Trip Bids button (Figure B. 7) .

The screenshot shows a software window titled "EMPLOYEE". Inside, there's a tabbed interface with "General", "Employment", "Billing", and "Other" tabs. The "General" tab is active, displaying a form with the following fields and values:

Employee #:	449
SSN:	123-45-6789
First Name:	Brett
Last Name:	Goshert
Address:	822 E. Union Hills Drive
	Suite 2-301
City:	Phoenix
State / Province:	AZ
Zip / Postal Code:	85024
Phone:	(800) 390-7520
Birthday:	5/18/2000

At the bottom of the window is a row of buttons: "OK", "Hours", "Schedule", "Log", "Routes", "Characteristics", "Trip Bids", and "Exit". An arrow points from a text box to the "Trip Bids" button.

Figure B. 7 – Calling the Driver Bids Screen from the Employee Screen.

Click the Trip Bids Button.



- This causes the Bid Search Screen to display showing all driver bids for this particular employee (Figure B. 8 ). Click the New button to enter a new bid ( Figure B. 8).

Employee	Bid#	Trip#	Points	Request	Status
----------	------	-------	--------	---------	--------

Figure B. 8 – The Driver Bid Search Screen.

Click the  
New button.



- This causes the Field Trip Bid screen to display ( Figure B. 9).

**Field Trip Bid**

Trip Num: 0 BID #: 1

Customer: NOT FOUND

Destination: Departure:

Purpose:

Employee: 449 Goshert, Brett

BID Amount: 0

Request Date: 5/18/00

OK Exit

Figure B. 9 – The Field Trip Bid Screen

- Enter the driver bid information including the trip number of the field trip that the driver is bidding on. When you have entered the complete bid click the OK button (Figure B. 10 ).

**Field Trip Bid**

Trip Num: 10858 BID #: 1

Customer: CACTUS VIEW ELEM.

Destination: Desert Hills Bowling Alley Departure: 5/9/00

Purpose: End of year reward

Employee: 449 Goshert, Brett

BID Amount: 50

Request Date: 5/18/00

OK Exit

Click the OK button when the driver bid has been entered.

Figure B. 10 – The Field Trip Bid Screen after the driver bid information has been entered.





5. You are returned to the Bid Search Screen with the driver bid displayed ( Figure B. 10). You may now enter another driver bid by clicking the New button or return back to the Employee Screen by clicking the Exit button.

The screenshot shows a window titled "BID SEARCH". At the top, there is a green box with the text "Bid Search". Below this, there are input fields for "Trip #:", "Employee #:" (containing "449"), and "Employee Last Name:". Below these fields is a table with the following data:

Employee	Bid#	Trip#	Points	Request	Status
Goshert, Brett	1	10858	50.00	5/18/00	BID

At the bottom of the window, there are five buttons: "Find", "New", "Edit", "Delete", and "Exit".

Figure B. 11 – The Bid Search Screen after the Driver's Field Trip Bid has been accepted.



## **How T.O.M. Uses the Driver's Bids when Automatically Assigning Drivers to Field Trips**

T.O.M.'s automatic assignment routine performs the following steps when assigning drivers to a field trip using the Bid Allowance method of assignment:

1. Determine if the trip has any driver bids.
2. If there are multiple driver bids for the trip attempt to use the use the highest bid.
3. Check the employee with the highest bid to see if there are any possible conflicts.
4. If there are conflicts then skip the driver and retrieve the next highest bid.
5. If there are no conflicts then check to see if the driver has enough remaining points in his / her allowance to fulfill the bid.
6. If the driver does not have enough points to fulfill the bid skip the driver and retrieve the next highest bid.
7. If the driver has enough points to fulfill the bid assign the driver to the field trip and subtract the bid points from the driver's remaining point allowance.
8. If there are no more bids for the trip then use the schedule(s) assign to the trip and use the rotation method of assigning drivers to field trips.

### **What happens when a field trip or driver is canceled?**

T.O.M. will add the number of points in the driver's bid back into the employee's bid allowance for a trip assignment that was cancelled from a driver.

### **What about driver refusals?**

When entering a driver refusal T.O.M. will prompt the user if he/she wishes to have the employee's bid points added back into the employee's point allowance for a field trip assignment that the employee is refusing.

### **What if we wish to assign an employee manually but still subtract points from the employee's bid allowance?**

The Assign Employee Manually Screen will allow the user to enter the number of points to be subtracted from the employee's bid allowance for the field trip assignment that that the employee is being manually given

### **Is there a way to keep track of what trips have been subtracted from an employee's bid allowance and how much points remain in that allowance?**

The Employee Bid Allowance Report was created for just this purpose. This report will show for a particular employee; the employee's name, each field trip assignment the employee has taken and the number of points subtracted for that assignment, each field trip refusal taken and the number of points subtracted for the refusal and the number of points remaining in the employee's point allowance. The user will be able to run this report for a particular employee or all employees and for a particular date range. *For more information about this report see Chapter 8 – Management Reports in your User's Guide.*



## Adjusting Driver's Bid Allowances

Periodically you will need to adjust your driver's bid allowances. You may, for example, wish to zero out all of your driver's bid allowances. Or, you may wish to increase or decrease all of your driver's bid allowances by a certain number of points. T.O.M. has a special routine to allow you to do just this. To do this simply click on the Maintain option in your Main T.O.M. menu and select the Group Bid Allowance Adjustment routine (Figure B. 12 ). This causes the Group Bid Allowance Adjustment Screen to display (Figure B. 13 ). From here you may either choose to zero out all driver's bid allowances or to adjust all the driver's bid allowances up or down by a specified number of points that you may enter in this screen. Once you have made your choice simply click the Adjust Now button and all of the driver's bid allowances will be adjusted according to your instructions.

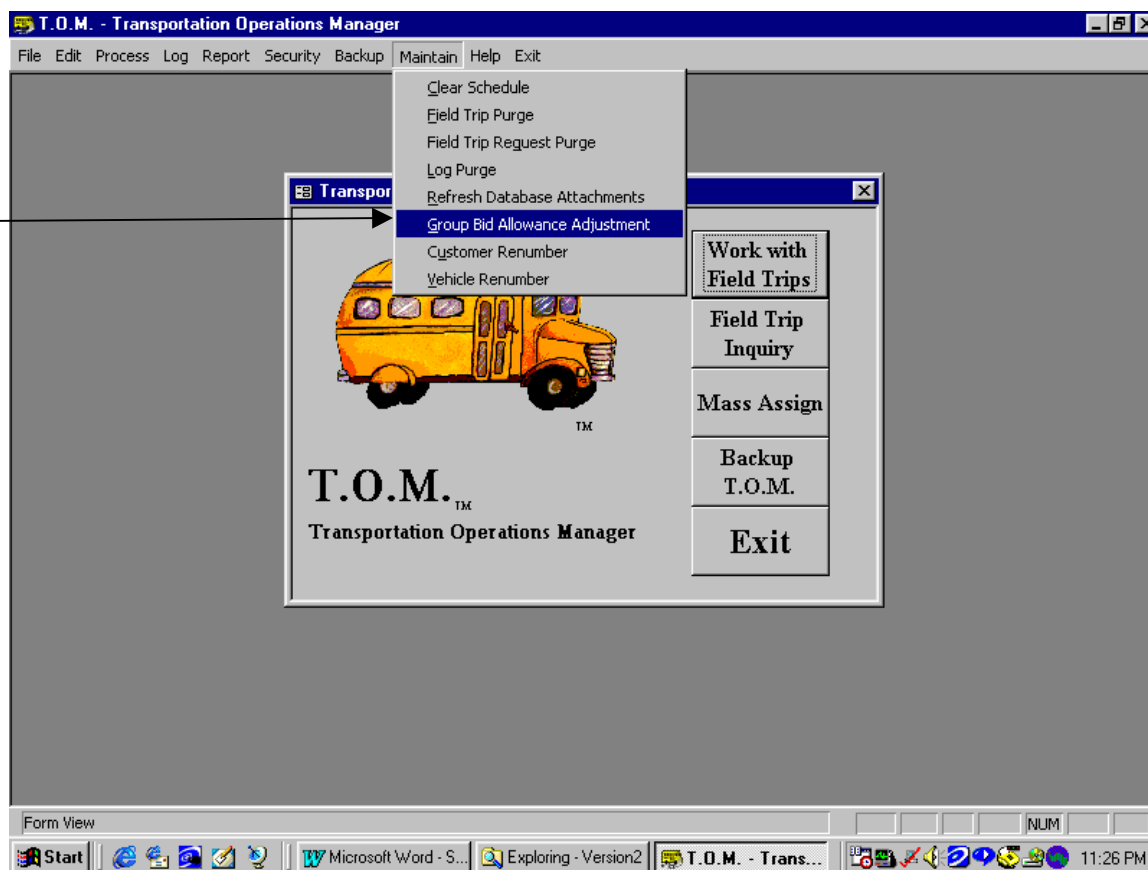



Figure B. 12 – Accessing the Group Bid Allowance Adjustment Routine.

Click on Maintain  
and then Group Bid  
Allowance  
Adjustment option.



**Purge Assignment Activity Log**

 **Group Bid Allowance Adjustment**

**WARNING - Do not run the Bid Allowance Adjustment Routine if anyone else is using T.O.M.**

**Backup your T.O.M. Database before running this adjustment routine!**

☐ Set All Employee Bid Allowances to 0

☒ Adjust the Employee Bid Allowances by:

*A positive value will be added and a negative value will be deducted from the bid allowance accounts.*

**ADJUST NOW** **Cancel**

Figure B. 13 - The Group Bid Allowance Adjustment Routine