

## Chapter 4

# District Options

District Options allows you to tailor the way that T.O.M. operates to your specific requirements. In District Options you can specify whether T.O.M. should prevent the automatic assignment of field trips from giving the employee overtime hours. You can tell T.O.M. how to automatically assign drivers to your field trips. You can also setup several assumed (or default) values that T.O.M. will assume when you are entering field trips on a regular basis. The default vehicle type and the drop return hours are examples of telling the system what to assume when field trips are entered. In the district options you may enter your district name, address and logo information and then specify whether T.O.M. is to print this information on your field trip estimates and invoices.

To access District Options open the File menu, then click Other (Figure 4-1). Click District Options and the District Options screen will be displayed (Figure 4-2).

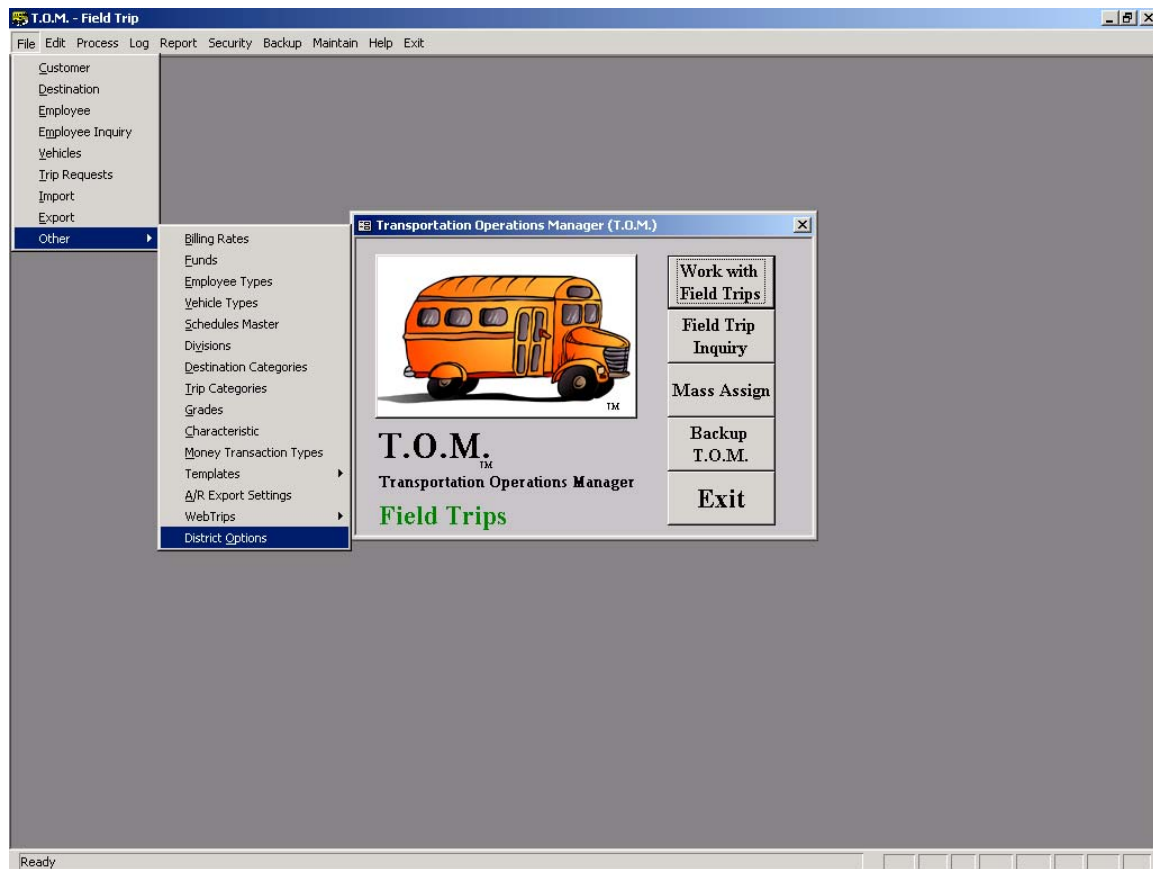


Figure 4-1. Accessing the District Options Screen

The District Options screen (Figure 4-2) uses a 'tabbed' format. That is, the information on the screen is grouped into different sections, or tabs, that you can display by clicking on that group's tab. This chapter contains complete descriptions of the fields found on the four tabs: General, Assignment, Billing and Other.



## Using the District Options General Tab

The General tab on the District Options screen (Figure 4-2) contains general information concerning your district's operation of T.O.M. The information on this tab is usually the root or key information for a field trip request. The following describes the data entry fields and options for this tab.

Figure 4-2. The General Tab on the District Options Screen

**District Name:** This is the name of your school district. It is 50 characters long.

**Transportation Title:** This is the title of your transportation department. It is 50 characters long. This title will print on the field trip estimate that you send to a customer.

**Address #1:** This is the first line of your district's street address. It is 30 characters long. You may choose to have this address print on your field trip estimates, invoices and statements.

**Address #2:** This is the second line of your district's street address. It is 30 characters long. You may choose to have this address print on your field trip estimates, invoices and statements.

**City:** This is the city that your district is located in. It is 15 characters long. You may choose to have this field print on your field trip estimates, invoices and statements.

**State:** This is the state that your district is located in. It is 2 characters long. You may choose to have this field print on your field trip estimates, invoices and statements.

**Zip:** This is the zip code for your district. It is 10 characters long. You may choose to have this field print on your field trip estimates, invoices and statements.



**Phone:** This is your districts phone number. When you enter this phone number T.O.M. automatically enters the parentheses around the area code and places a dash between the third and the fourth digit of the root phone number. If you do not wish to enter an area code with the phone number, then enter three spaces in place of the area code and T.O.M. will automatically position you to the first digit of the main phone number.

**Replace Cancellations:** This is a checkbox field. That is, it is either checked or not checked. If this option is checked you are telling T.O.M. that you wish to have the automatic assignment logic of T.O.M. check to see if there are any drivers with cancellations that have not been replaced. If there are drivers with unreplaced cancellations and this option is checked T.O.M. will automatically attempt to replace those cancellations with future field trips before it assigns drivers from the schedule assigned to the field trip. If this option is not checked then T.O.M. will ignore cancellations when assigning drivers to field trips. For more information about how T.O.M. uses cancellations see *Chapter 2 - Assigning Drivers & Vehicles to Field Trips, Printing Trip Tickets & Garage Check Lists* and *Chapter 3 - Canceling Field Trips and Individual Drivers* in the *T.O.M. User Guide*.

**Replace Auto Skips / Makeups:** This is a checkbox field. That is, it is either checked or not checked. If this option is checked you are telling T.O.M. that you wish to have the automatic assignment logic of T.O.M. check to see if there are any drivers who were skipped during automatic assign or who were manually set to Pass - Makeup that have not had the makeup replaced. If there drivers with unreplaced makeups/skips and this option is checked T.O.M. will automatically attempt to replace those makeups with future field trips. If both this option is checked and the Replace Cancellations option is checked then T.O.M. will first try and assign the field trip to drivers with unreplaced cancellations and then to drivers with unreplaced skips / makeups.

Checking this option also instructs T.O.M. to automatically place drivers on the makeup list who are skipped during automatic assignment of a field trip due to another conflicting field trip or due to preclusion of overtime. If this option is not checked then T.O.M. will simply skip those drivers with conflicting field trips or those drivers who are in an overtime situation.

If this option is not checked then T.O.M. will ignore makeups when assigning drivers to field trips. For more information about how T.O.M. uses cancellations see *Chapter 2 - Assigning Drivers & Vehicles to Field Trips, Printing Trip Tickets & Garage Check Lists* and *Chapter 4 - Driver Refusals, Passes and Passes with Makeups* in the *T.O.M. User Guide*.

**Log Assignment Activity:** This is a checkbox field. That is, it is either checked or not checked. If this option is checked you are telling T.O.M. to record all events that affect driver and vehicle assignment to field trips to T.O.M.'s Assignment Activity Log. This log is very useful in determining why drivers and vehicles did or did not get assigned to a field trip.

If this option is not checked then T.O.M. will record all events that affect driver and vehicle assignment to field trips to T.O.M.'s Assignment Activity Log. For more information about T.O.M.'s Assignment Activity Log see *Chapter 11- Assignment Activity Log* in the *T.O.M. User Guide*.

**Default Vehicle Type:** To make your job of entering the hundreds or thousands of field trips into the computer T.O.M. tries to assume as much as possible for each new field trip. The Vehicle Type is one of the assumptions that T.O.M. tries to make when you enter a new field trip. Whenever you enter a new field trip, T.O.M. automatically sets the Vehicle Type of the new field trip to the Default Vehicle Type that you entered here.

The button with the arrow pointing down to the right of this field indicates that this field is a drop down list field. That is if you click this button, you are given the valid choices available for this field. When you click this button, you are shown all of the Vehicle Types that you have entered into T.O.M.



As you know the Vehicle Type is used by T.O.M. when T.O.M. automatically assigns vehicles to a field trip. The Vehicle Type that you select in a field trip tells T.O.M. what type of vehicles T.O.M. is to assign to the field trip.

T.O.M. also uses the Vehicle Type to calculate the number of vehicles that are required by a field trip. Each Vehicle Type has three different passenger capacities assigned to it that you entered when you setup the Vehicle Type. For more information about Vehicle Types see *Vehicle Types* in *Chapter 3 - Entering Lookup Lists* in this manual. For more information about how T.O.M. uses Vehicle Types when automatically assigning vehicles to a field trip, see *Chapter 2 - Assigning Driver & Vehicles To Field Trips, Printing Trip Tickets & Garage Check Lists* in the *T.O.M. User Guide*.

**Drop / Return Trip Standard Hours:** Many field trips that your department performs are simply no more than dropping students off at a location, returning to the transportation office, then at a designated time returning to the location to pickup the students and returning them to their original location. Many districts call this a Drop / Return Trip. These districts usually have a minimum number of hours that they will charge the customer for performing these types of field trips.

This field is where you would enter the minimum number of hours that your district charges the customer for performing a Drop / Return Trip. When you are entering a new field trip, you can check a box titled Drop / Return. If you check this box in the Field Trip screen and you have NOT entered the Est. Driver Time, then T.O.M. will automatically place the Drop / Return Trip Standard Hours in the District screen in the Est. Driver Time in the Field Trip screen. For more information about entering a new field trip, see *Chapter 1 - Entering Field Trips and Printing Estimates* in the *T.O.M. User Guide*.

**Auto Fill Field Trip List:** This checkbox instructs T.O.M. whether or not the Work With Field Trip screen should retrieve all of your field trips when you first launch the screen or wait for the user to enter search parameters in to instruct it when to search. If you find that the Work With Field Trips screen tends to take a long time to load then you may consider unchecking this checkbox. By unchecking this checkbox the Work with Field Trips screen will load much quicker, however, no field trips will display at first in the field trip list. Only after the user has clicked the Find All button will field trips display in the list.

**Auto Fill Field Trip Request List:** This checkbox instructs T.O.M. whether or not the Work With Field Trip Requests screen should retrieve all of your field trip requests when your school users first launch the screen or wait for the school user to enter search parameters in to instruct it when to search. If you find that the Work With Field Trip Requests screen tends to take a long time to load then you may consider unchecking this checkbox. By unchecking this checkbox the Work with Field Trip Requests screen will load much quicker, however, no field trip requests will display at first in the field trip list. Only after the user has clicked the Find All button will field trip requests display in the list.

## Using the General Tab to Import a Scanned Copy of Your District Logo

T.O.M. can store a scanned version of your district logo in its database and then print it on the field trip invoices and estimates that you send to your customers. Having your district logo on your field trip invoice and estimates can give them an even more professional appearance. The following is a step-by-step set of instructions on importing your district logo into the T.O.M. database:

1. **Scan in your district logo and store it in a directory on your hard disk.** Either scan in your district logo or acquire a file representing this scanned version of your district logo from your Data Processing Department. ***The scanned format must be in a BITMAP format!*** **NOTE:** a file that is in the Bitmap file format should have some kind of name followed by the characters “.bmp”.
2. **Start T.O.M. and go to the District Options screen in T.O.M.**



3. **Double-click on the box labeled District Logo.** While in the District Options screen (Figure 4-3) point to the box labeled District Logo and double click it with your mouse. The Insert Object screen should appear (Figure 4-4).

Double click on this square.

Figure 4-3. Telling T.O.M. That You Want To Import Your District Logo

4. **Select the option marked Create From File.** While in the Insert Object screen (Figure 4-4) click the option labeled Create From File. The Insert Object screen should change in appearance to look like Figure 4-5.



Click this option to load the picture you scanned.

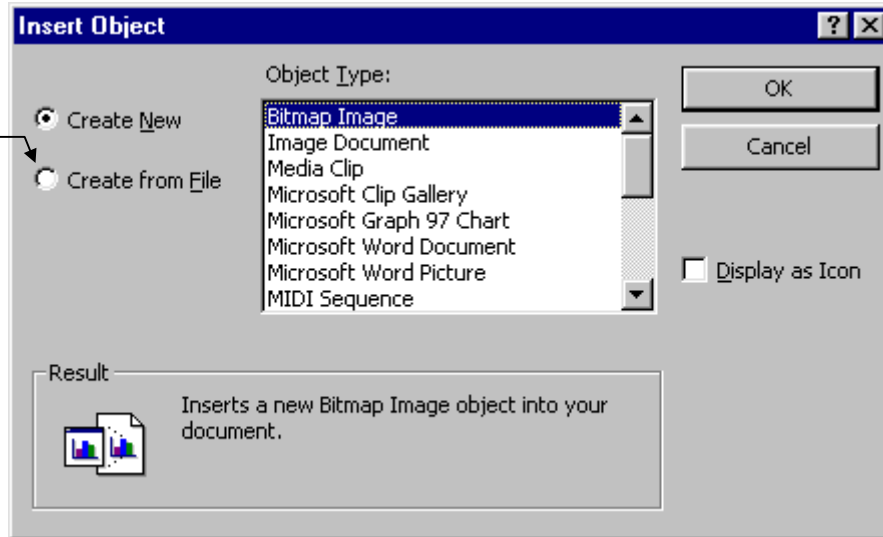


Figure 4-4. The Insert Object Screen - Selecting the Create From File Option

5. **Click the Browse button and find your bitmap file.** While in the new Insert Object screen (Figure 4-5) type in the File field the name of the drive and directory where your picture is stored, and then click the Browse button. A standard Windows File Browse screen will appear which will allow you to view the various files stored in your system (Figure 4-6).

Click the button labeled Browse.

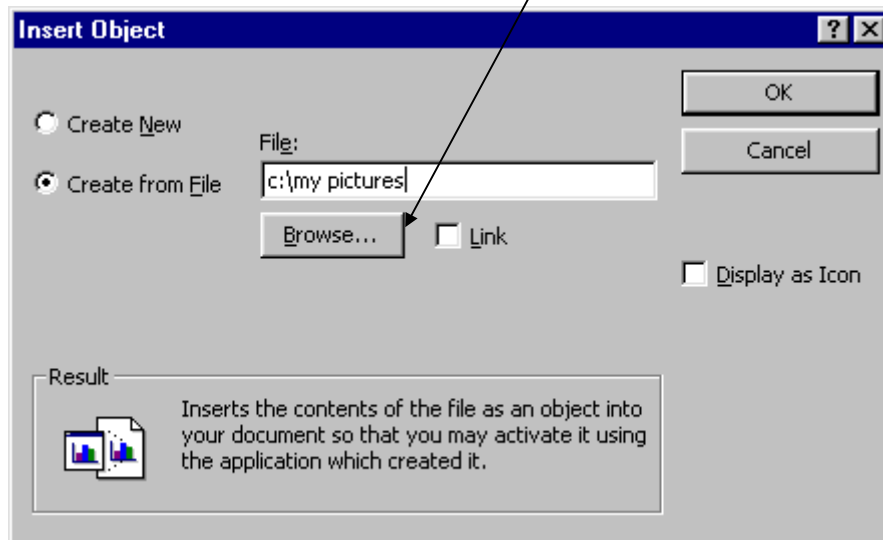


Figure 4-5. Insert Object Screen - Create From File - Selecting the Browse Option

6. **Select that picture file and click the OK button.** You will be returned to the Insert Object screen and your Bitmap filename will appear in the File field (Figure 4-7).

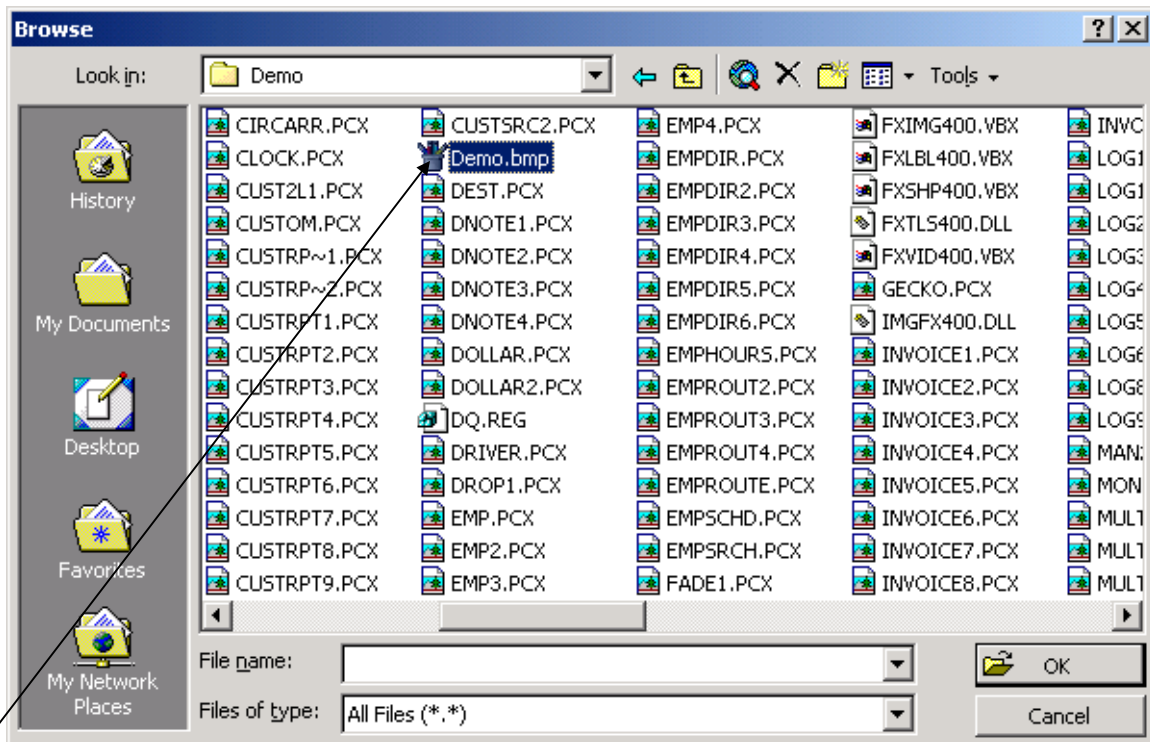


Figure 4-6. The File Browse Screen - Locate Your Bitmap File and Select It

Find your bitmap file, select it and click the button labeled Open.



**Click the OK button.** Click the OK button in the Insert Object screen (Figure 4-7). Microsoft Paintbrush will automatically open within your district logo (Figure 4-8). This is done to allow you to make any changes to your logo image. (**NOTE:** It is recommended at this time that you NOT make any changes to the scanned images of your logo.)



Figure 4-7. Insert Object Screen AFTER Your District Logo File Has Been Selected





Click any part of the District Options Screen.

Figure 4-8. Microsoft Paintbrush Screen With Your District Logo Loaded

**Exit Microsoft Paintbrush.** Click on any part of the District Options Screen (Figure 4-8) and the Microsoft Paintbrush Session will end. You will be returned to the District Options screen with your district logo placed in the box labeled District Logo (Figure 4-9).



Your district logo is now imported into T.O.M.!

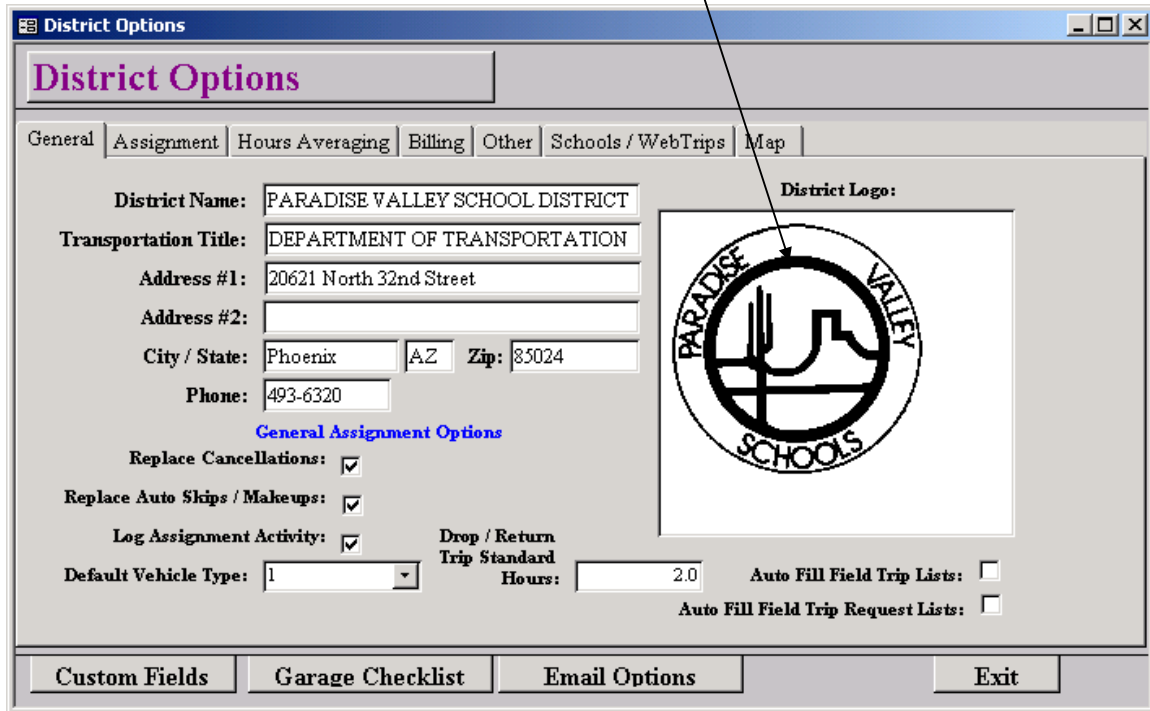
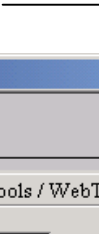


Figure 4-9. District Options Screen - With Your District Logo Now Stored In T.O.M.

Congratulations! You have successfully imported a scanned copy of your district logo into T.O.M.! You may now print field trip invoices and estimates with your district logo. **NOTE:** Make sure that you have checked the option on your District Options screen labeled Print Logo on Invoice / Estimate.



## Using the District Options Assignment Tab

The Assignment tab on the District Options screen (Figure 4-10) contains specific information on how your district wants T.O.M. to automatically assign drivers to your field trips. In this section you can choose whether to have your drivers assigned to field trips by hours averaging or rotation. You can specify whether T.O.M. you preclude overtime when assigning field trips and whether T.O.M. should consider a driver's routes when assigning that driver to a field trip. The following describes the data entry fields and options for this tab.

Figure 4-10. The Assignment Tab on the District Options Screen

**Automatic Assignment Method:** This is where you instruct T.O.M. what basic method of assignment you want T.O.M. to use when automatically assigning drivers to field trips. You may choose one of the following four methods:

- *Rotation:* meaning you want your T.O.M. to rotate among the driver list (schedule) when assigning trips. This method is sometimes referred to as the 'Wheel' method because you rotate amongst each driver on the list assigning field trips. In short the basic philosophy of this method is that each driver gets one turn at a field trip assignment. When it's a driver's turn he / she gets the next field trip to be assigned. Whether that field trip is a long or a short field trip is irrelevant. All that matters is that each driver gets a turn at a field trip assignment.

When you select Rotation a section of the Assignment screen titled Rotation Options is *enabled*. In this section you can give T.O.M. more precise information on how you wish T.O.M. to rotate your drivers in their lists (schedules). For more information about these options see *Assignment Rotation Options* later in this chapter.

- *Hours:* meaning hours averaging or hours equalization. This tells T.O.M. that you want to have your drivers *field trip hours equalized*. Using this method T.O.M. does not pay attention to what driver was last assigned a field trip. Rather, T.O.M. will total up a drivers field trip hours for both



his assignments AND REFUSALS and award the driver with the least number of field trip hours the field trip assignment. (**NOTE:** The driver that is awarded the field trip assignment must be in the list of drivers you told T.O.M. to use when assigning. T.O.M. will then try and equalize the hours of all drivers in that list.)

When totaling the field trip hours for the field trips T.O.M. will always try and use the actual hours first then if the field trip does not yet have actual hours T.O.M. will use the field trip's estimated hours. The overall philosophy at work is that within the restrictions of driver lists and precluding overtime that you place T.O.M. will attempt to give all drivers an equal amount of field trip hours.

When you select Hours a section of the Assignment screen titled Hours Averaging Options is *enabled*. In this section you can give T.O.M. more precise information on how you wish T.O.M. to equalize your drivers' field trip hours. For more information about these options see the section marked Hours Averaging Options later in this chapter.

- *Bid Allowance:* This method is similar to the straight bidding method where the field trips are posted and drivers take turns picking the field trips he / she wishes to drive. The Bid Allowance method puts a small twist on this method. With the Bid Allowance method the drivers bid a certain number of points for the trips he / she wants to drive. The driver that bids the highest number of points with no conflicts will be awarded the field trip.

In the Bid Allowance method, T.O.M. allows you to enter the driver's allowances, enter the driver's bids and then T.O.M. automatically chooses the highest bidding driver, checking for conflicts, checking if the driver's allowance has enough points for the bid and finally assigning the driver. See *Appendix B. How to Use the Bid Allowance Automatic Assignment Method* for additional details.

- *Seniority:* meaning T.O.M. can automatically assign drivers to field trips using a straight seniority method of assignment. Using this method the senior most driver on a schedule would ALWAYS be given first chance to be automatically assigned to any field trip using that schedule. Only if that driver has a conflict will T.O.M. rotate to the next most senior driver.

**Check For Conflicts Outside of Schedules:** As you probably know T.O.M. let's you group your drivers and vehicles in to lists called *schedules*. When T.O.M. is attempting to assign a driver to a field trip T.O.M. ensures that this field trip assignment will not conflict with another field trip assignment that the driver has on the same day.

By default T.O.M. will consider another field trip assignment in conflict with a potential field trip assignment if it is for the same driver on the same day WITHIN THE SAME SCHEDULE. If your district has many schedules or if the field trips in different schedules tend to overlap in time you will probably want T.O.M. to also check field trip assignment that a driver has *outside* a particular schedule.

If you CHECK this option you are telling T.O.M. to look for potential field trip conflicts for field trips within the schedule or in OTHER schedules. When T.O.M. checks for a field trip conflict it looks to see if a field trip is on the same day for the same driver and is *around* the same time as the potential field trip assignment. If for example a driver is driving one field trip from 11:30 AM to 2:30 PM and T.O.M. is trying to assign the driver to another trip on the same day that runs between 10:00 AM and 12:00 PM T.O.M. will recognize that these two trips overlap in time and will skip the driver.

You can even specify an amount of time that you consider to be too close to allow the driver to drive the two trips. For example, you told T.O.M. that if one field trip starts within half an hour of when another field trip began you would consider that too close to comfortably assign both field trips to the same driver. So if T.O.M. were attempting to assign a driver to a trip that went from 9:00 AM to 11:15 AM and that driver was already driving another field trip from 11:30 AM to 2:30 PM then T.O.M. would consider this to be



too close to assign and would skip the driver. This time period that you specify is call the *Conflict Hours Range* and is described in more detail just below.

If you UNCHECK this field then you are instructing T.O.M. you are instructing T.O.M. to just consider field trips on the same day with the same schedule as field trips that are in conflict with the field trip that T.O.M. is trying to define. You would UNCHECK this field if you are confident that field trips using different schedules would not be in conflict with one and other. This option will result in T.O.M.'s automatic assignment running slightly faster.

**Conflict Hours Range:** This field is used in conjunction with the CHECK FOR CONFLICTS OUTSIDE OF SCHEDULES field. If the CHECK FOR CONFLICTS OUTSIDE OF SCHEDULE FIELD is clicked then T.O.M. will check to see if a driver that is about to be assigned a field trip during automatic assignment has another field trip that starts are ends within the Conflict Hours Range. You would enter the number of hours or a fraction of an hour. For example if you enter .5 in this field you are telling T.O.M. to check to see if a driver has other field trips that are within one half an hour of the field trip that the driver is about to be automatically assigned to.

**Mass Assign Order:** This field tells T.O.M. in what order T.O.M. is to select a group of field trips to assign drivers and vehicles. With the Mass Assign routine T.O.M. will allow you to assign up to a week of field trips with one click of a button. Some districts have specific policies with their driver unions or associations as to what order the trips are selected for assignment. The following is a detailed discussion of each of the choices you can make for the Mass Assign Order:

Order	Description
Date	This choice tells T.O.M. to sort the field trips by the field trip departure date, then the first schedule assigned to the field trip and finally the field trip number. T.O.M. sorts the trips in ascending order. That is the field trip with the earliest date will be selected before the field trip with the later date.
Hour	This choice tells T.O.M. to sort the selected field trips by the estimated driver hours of the field trip, then the departure date, then the first schedule of the field trip and finally the field trip number. T.O.M. will sort the trips by descending order for the estimated driver time then ascending order for all other fields. That is, T.O.M. will select the longer trips before the shorter trips and if the trips are the same amount of time T.O.M. will select the earlier trips before the later trips.
Date & Time	This choice tells T.O.M. to sort the field trips by the field trip departure date, departure time and schedule.

## Rotation Options

These are options that are made available to you if you select Rotation or Bid for the Automatic Assignment Method (Figure 4-10). If you chose Hours for the Automatic Assignment Method these options will be *disabled* that is they will not be available to you.

**Rotation Order:** This is the order that you wish to have T.O.M. use when rotating field trip assignments to drivers on your driver list (schedule). The default for this field is Seniority. That tells T.O.M. to sort the drivers on each driver list (schedule) by their hire date and then the seniority field within that and to assign field trips in that order. T.O.M. remembers that last driver that was up for assignment when it is done assigning field trips and will begin with that driver the next time it assigns field trips. The following is a list of the Rotation Orders that you may select from:

Rotation Order	Description
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Seniority (default)	Sorts employees by hire date then seniority field.
Alpha	Sorts employees by last name then first name.
License	Sorts employees by license date and then seniority field.
Certificate	Sorts employees by certification date and then seniority field.
User	Sorts employees by custom user fields #1 and #2.

**Allow Weekly Overtime:** This is a checkbox field. That is it is either checked or not checked. If this option is checked, you are instructing T.O.M. that when it is automatically assigning drivers to field trips T.O.M. is not to be concerned about whether a field trip assignment will place a driver in a weekly overtime situation.

If this field is NOT CHECKED, then T.O.M. will not allow a driver to be assigned a field trip if that field trip combined with the driver's normal route hours and any other field trips assigned to that driver for the week add up to an amount greater than the number of hours you have designated in the *Weekly O.T. Hours* field. If you have different weekly overtime hours limits for different employee types T.O.M. allows you to specify these different weekly overtime limits in the Employee Type information. For more information about specifying weekly overtime limits by Employee Type see the Employee Type section of Chapter 3 - Entering Lookup Lists of this manual.

If this box is not checked, T.O.M. will automatically bypass any driver that will be in an overtime situation when T.O.M. is assigning drivers to field trips. For more information about how T.O.M. precludes overtime while assigning drivers and vehicles to field trips, see *T.O.M. Ensures That No Drivers or Vehicles Have Scheduling Conflicts, If Applicable T.O.M. Also Ensures No Drivers Are Given Overtime* in Chapter 2 - Assigning Driver & Vehicles To Field Trips, Printing Trip Tickets & Garage Check Lists in the *T.O.M. User Guide*.

## Overtime Options

**Weekly O.T. Hours Limit:** This is the limit to the number of weekly hours that an employee is allowed to have. If the *Allow Weekly Overtime* field is NOT CHECKED then T.O.M. will skip a driver during automatic assignment if the hours of that field trip assignment will cause the employee to have total weekly hours greater than the *Weekly O.T. Hours*.

**Allow Daily Overtime:** This is a checkbox field. That is, it is either checked or not checked. If this option is checked you are instructing T.O.M. that when it is automatically assigning drivers to field trips, T.O.M. is not be concerned about whether a field trip assignment will place a driver in an daily overtime situation. If this field is NOT checked then you are instructing T.O.M. to not allow a driver to be assigned a field trip if that field trip combined with the driver's normal route hours and any other field trips assigned to that driver for the day will add up to total hours greater than the number of hours you have designated in the *Daily O.T. Hours* field. If you have different daily overtime hours limits for different employee types T.O.M. allows you to specify these different daily overtime limits in the Employee Type information. For more information about specifying daily overtime limits by Employee Type see *Employee Type* in Chapter 3 - Entering Lookup Lists of this manual.

If this box is not checked T.O.M. will automatically bypass any driver that will be in an overtime situation when T.O.M. is assigning drivers to field trips. For more information about how T.O.M. precludes overtime while assigning drivers and vehicles to field trips see *T.O.M. Ensures That No Drivers or Vehicles Have Scheduling Conflicts, If Applicable T.O.M. Also Ensures No Drivers Are Given Overtime* in the Chapter 2 - Assigning Driver & Vehicles To Field Trips, Printing Trip Tickets & Garage Check Lists in the *T.O.M. User Guide*.

**Daily O.T. Hours Limit:** This is the limit to the number of daily hours that an employee is allowed to have. If the *Allow Daily Overtime* field is NOT CHECKED then T.O.M. will skip a driver during



automatic assignment if the hours of that field trip assignment will cause the employee to have total daily hours greater than the *Daily O.T. Hours*.

**Use of Employee Route Hours:** T.O.M. allows you the option of entering all of your employees routes. You may then instruct T.O.M. to consider these routes when assigning drivers to field trips. This field is where you tell T.O.M. how to factor the drivers routes when automatically assigning drivers to a field trip. You have three choices that you can make for this field. The following is a detailed discussion of each of these choices:

Choice	Description
Don't use the route hours	This choice tells T.O.M. to ignore any employee routes when automatically assigning drivers to field trips.
Use to prevent conflicting field trips	This choice tells T.O.M. avoid giving a field trip to a driver if that field trip will conflict with one or more of the driver's routes.
Use to subtract overlap time from overtime	<p>This choice tells T.O.M. factor possible route and field trip overlap time when precluding overtime. Normally, T.O.M. adds a drivers hours that you entered in the Employee screen with the total hours of the field trips that the driver is assigned to for that week with the estimated hours of the potential field trip assignment T.O.M. is about to give the driver. If those hours exceed the overtime hours then the driver is skipped.</p> <p>With this choice, however, T.O.M. will examine both the potential field trip and all of the field trip assignments the driver has for the week to see if they overlap with any of the driver's routes. T.O.M. then totals this overlap time and subtracts it from the total weekly hours of the driver. After subtracting these overlap hours from the weekly hours T.O.M. then determines if the potential field trip assignment will cause the driver to exceed the weekly / daily overtime hours.</p> <p>In essence with this choice you are telling T.O.M. to assume that a driver will not perform any route that runs during the same time that a field trip that the driver is assigned to runs.</p>
Both – Prevent conflicting trips and if a trip is found overlapping subtract from O.T.	<p>This choice helps districts that occasionally need to manually assign drivers to field trips that DO conflict with employee's routes.</p> <p>Many of our customers requested that T.O.M. use BOTH considerations when automatically assigning drivers. We at Gecko at first thought this was strange. After all, why would you want T.O.M. to subtract any overlapping routes from an employee's overtime calculation if you told T.O.M. to NOT assign an employee to any field trips that conflict with that employee's routes. Wouldn't this cause an employee to never have any overlapping routes and field trips? The answer our customers gave was that you would have overlapping routes and field trips if you occasionally had to manually assign employees to trips that DO conflict with the employee's routes. In that case you are most likely pulling the employee off the route. So they wanted T.O.M. to recognize when the employee is ALREADY assigned to a field trip that conflicts with one or more routes AND to subtract those overlapping route times from the employee's overtime calculation.</p>





**Current Route Tract #:** T.O.M. allows you to enter multiple sets of drivers bus routes for each driver. You can then group these bus routes into tracts. For example if your school has one set of bus routes in the spring and one set in the fall you can enter both sets of bus routes and group all of the spring routes in tract 1 and all the fall bus routes in tract 2. You can then tell T.O.M. which is tract is the current tract in use. T.O.M. then only uses driver's bus routes that are of the same tract # as the Current Route Tract # entered here.

**Standard Trip Route Conflict Range:** This field allows you to specify a space of time between the field trip and rout that you would consider too close. This time period is subtracted from the field trip's start time and added to the field trip's end time. Both times are then compared to all of the employee's routes for the day of the field trip.

For example, driver Bill is being considered for assignment to a field trip that starts at 12:00 PM and ends at 2:25 PM. Bill has a route that starts at 2:30 PM. This may be too close for most dispatcher's comfort. Assume now you have specified a Standard Trip / Route Conflict Range of .25 hours (15 minutes). T.O.M. subtracts .25 hours from the start time and adds .25 hours to the return time. The new modified start time of 11:45 AM and 2:40 PM are compared to Bill's route times for that day. T.O.M. would, therefore, skip Bill for the field trip because the field trip's modified return time was conflicting with Bill's beginning route time of 2:30 PM.

**Drop / Return Trip Route Conflict Range:** This field allows you to specify a space of time between a drop / return field trip and route that you would consider too close.

A Drop / Return Trip is a trip where the driver(s) would take the passengers to the destination and instead of waiting at the destination for the passengers to complete the field trip, return back to the bus garage without the passengers and finally, return back to the destination to pick up the passengers at a designated time. The advantage of a drop / return trip is that it allows the driver to perform a route while the passengers are engaged in the field trip activity. When you enter a field trip into T.O.M. you can check a checkbox indicating that the field trip is a drop / return field trip. If a trip is marked as drop / return then T.O.M. will know to use a special logic when determining if a driver's routes are in conflict with the field trip assignment.

Normally, T.O.M. is skipping drivers due to route conflicts if a driver has a route that was between the trip's departure and return times. Normally this logic is acceptable. In a drop and return trip, however, this can be too aggressive.

When checking to see if the driver's route(s) will conflict with a drop / return trip T.O.M. will not simply see if the route time is in conflict with the trip's departure and return times. Instead T.O.M. will take the Drop / Return Trip Route Conflict Range field and both adds it to and subtracts it from the departure time and return time of the field trip to create two sets of time ranges. T.O.M. then checks to see if the driver's route(s) conflict with these two ranges. If there is a conflict then the driver is skipped. If there is not then the driver is assigned.

For example, Shelly the driver had a daily route from 11:00 AM – 12:30 PM and she was being considered for a field trip that was to have her pick up a class at 9:45 AM, take them to the destination and drop them off, then return at 5:00 PM and take them back to school. If the field trip was NOT marked as drop / return T.O.M. would skip Shelly. T.O.M. did this because Shelly's daily route was considered in conflict with the field trip.

Now let's use this same example except now the field trip IS marked as drop / return. Let's say for example you that have set the Drop / Return Trip Route Conflict Range to a range of .5 (1/2 hour). T.O.M. would take this conflict range and add it to and subtract it from both the departure time and the return time to come up with two sets of ranges to check for possible conflicts with Shelly's routes for the day. Therefore, T.O.M. adds 1/2 hour from 9:45 AM and 5:00 PM field trip start and return times. This results in two time ranges of 9:15 – 10:15 AM and 4:30 – 5:30 PM to check for conflicts with Shelly's routes for the





day. T.O.M. then checks to see if Shelly's route of 11:00 AM – 12:30 PM conflicts with these two time ranges. It doesn't so T.O.M. will now assign Shelly to this drop and return field trip.



## Using the Hours Averaging Options Tab

The Hours Averaging Options Tab (Figure 4. 11) is used if you selected your Automatic Assignment Method to be Hours in your Assignment Options Tab (Figure 4-10). This section gives you various options that allows you to instruct T.O.M. exactly how you want your field trips to be assigned using the hours averaging method of automatic assignment.

**District Options**

General Assignment **Hours Averaging** Billing Other Schools / WebTrips Map

Hours Averaging Options:

Average Hours Within the Schedule : ☒

How to break ties within a schedule: Total Hours

Total Date Range Usage: Beginning Date

Total field trip hours starting date: 11/25/1997

Total field trip hours ending date: 12/8/2000

Add Route Hours into total field trip hours: ☐

Recalculate Hours Before Assigning a single driver to a trip: ☐

Recalculate Hours Before Assigning Drivers for a single trip: ☐

Custom Fields Garage Checklist Email Options Exit

Figure 4. 11 – The Hours Averaging Section Tab of the District Options Screen

**Average Hours Within the Schedule:** This is a checkbox field. That is it is either checked or not checked. This instructs T.O.M. how you want T.O.M. to equalize your field trip hours. As you know T.O.M allows you to organize your drivers into groups or lists. These lists are called *schedules*. You may create lists of drivers that reflect certain times of the day or weekend. If you have Average Hours Within the Schedule CHECKED you are telling T.O.M. that you want T.O.M. to track the driver for each of these schedules and when assigning field trips to equalize the hours for each schedule. So when assigning a field trip in a weekend schedule, for example, T.O.M. will try and ensure that the number of hours of weekend field trips is equal amongst the drivers on the weekend schedule. If this field is NOT CHECKED T.O.M. will factor in ALL field trip hours not just weekend field trips.

Let's use this in an example. Paradise Valley School District has three schedules Mid Day, Week Day and Week End. Mid Day are field trips taken during the weekday during school hours. Week Day are field trips taken during the week day after school hours and Week End are field trips taken during week ends.

Paradise Valley is going to use the Hour Averaging method of automatic assignment. In the first example Paradise Valley leaves the Average Hours Within the Schedule field as NOT CHECKED. Now during automatic assignment T.O.M. is trying to assign a weekend field trip using a list of 10 drivers. On that list is Bob Weekend-Only Driver and as his name alludes Bob only drives field trips on the weekend while all the other driver on the schedule drive field trips on the Mid Day and Week Day schedules. Because Bob only drives on the weekends his total field trip hours for the year are going to probably be much less than all of the other drivers. This means that when a weekend field trip needs a driver T.O.M. will probably



assign Bob to a majority of the Week End field trips because he will be low on total field trip hours. This situation may cause friction with the other 9 drivers on the Week End schedule.

If Paradise Valley decides that having Bob get a majority of the Week End field trips is not fair then Paradise Valley can CHECK the Average Hours Within the Schedule field. Now when T.O.M. is automatically assigning a weekend field trip T.O.M. will try and equalize the Week End field trip hours ONLY. The result is that every driver on the Week End Schedule has pretty much the same number of Week End field trip hours assigned to them regardless of any Mid Day and Week Day field trips they may perform.

**How to break ties within a schedule:** If T.O.M. encounters a tie when making an assignment, this field tells T.O.M. how to break that tie. You can select the tie to be broken by either Seniority only or by Total Field trip Hours (regardless of schedule) first and by Seniority second.

**Total Date Range Usage:** Click the drop-down arrow to select from the list. Select Beginning Date to total all field trips from the beginning date forward. The Beginning Date is entered in the Total field trip hours starting date field described below. Select Date Range to total trips with the date range as entered in the Total field trip hours starting date field and Total field trip hours ending date field described below.

**Total field trip hours starting date:** Enter the starting date to begin totaling field trip hours. This field is available when Beginning Date or Date Range is selected in the Total Date Range Usage field described above.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a “/” or a “-” when typing in the date, T.O.M. automatically places a “/” between the Month, Day and Year (this is called ‘masking’). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of ‘3/2/1994’ you would type ‘03021994’ and T.O.M. would automatically place two ‘/’ in the appropriate positions in the date. The year must be entered as the full year (ex. ‘1997’ not ‘97’). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you just click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen just click on the little button next to this date field that looks like a small calendar. For more information on T.O.M.’s Pop Up Calendar screen see *Appendix C - The Pop Up Calendar Screen* later in this manual.

**Total field trip hours ending date:** Enter the ending date to stop totaling field trip hours. This field is available only when Date Range is selected in the Total Date Range Usage field described above. It is not available when you select Beginning Date.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a “/” or a “-” when typing in the date, T.O.M. automatically places a “/” between the Month, Day and Year (this is called ‘masking’). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of ‘3/2/1994’ you would type ‘03021994’ and T.O.M. would automatically place two ‘/’ in the appropriate positions in the date. The year must be entered as the full year (ex. ‘1997’ not ‘97’). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you just click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen just click on the little button next to this date field that looks like a small calendar. For more information on T.O.M.’s Pop Up Calendar screen see *Appendix C - The Pop Up Calendar Screen* later in this manual.

**Add Route Hours into total field trip hours:** Check this box if you want T.O.M. to add Route Hours for the past week. NOTE: Route Hours ONLY FOR THE PAST WEEK are added. Uncheck this checkbox to not add Route Hours for the past week.



**Recalculate Hours Before Assigning a Single Driver to a Trip:** This is a checkbox field. That is it is either checked or not checked. This use of this field is explained in the discussion of the use of the *Recalculate Hours Before Assigning Drivers for a Single Trip* field below.

**Recalculate Hours Before Assigning Drivers for a Single Trip:** This is a checkbox field. That is it is either checked or not checked. This field tells T.O.M. whether T.O.M. should total drivers field trip hours before assigning drivers when you click the Assign button in the field trip screen.

To equalize field trip hours T.O.M. will total the field trip hours for driver's assignments and refusals starting from a date that you specify. When a driver is assigned to a field trip T.O.M. will automatically add that field trip's hours to the driver's total hours. But, there are many things that can change a driver's field trip hours changing a driver's total hours, canceling a field trip, changing a field trips estimate hours, etc. Because there are many ways to change a driver's field trip hours T.O.M. should recalculate the driver's field trip hours on a regular basis. However, depending on you district's volume of field trips and speed of you computer equipment this recalculation of field trip hours can be a bit time consuming. You must decide what is the right balance of timeliness updating of driver field trip hour vs accuracy.

There are three ways that you can automatically assign drivers to field trips:

- In the Mass Assign Routine where drivers will be assigned to a group of field trips. T.O.M. will always recalculate drivers' field trip hours before automatically assigning drivers to a group of field trips.
- In the Field Trip screen where all drivers for a single field trip are automatically assigned. If you CHECK the *Recalculate Hours Before Assigning Drivers to a Single Trip* field then T.O.M. will recalculate driver hours when you click the Auto Assign Driver button in the field trip screen. You should check this field if your organization tends not to use the Mass Assign procedure and you retrieve your trips one at a time and click the Auto Assign Button.
- In the Field Trip Driver Information screen where one driver is assigned to a field trip. If you CHECK the *Recalculate Hours Before Assigning a Single Driver to a Trip* field then T.O.M. will recalculate driver hours when you click the Add Driver Automatically button in the Trip Driver Information screen. You should check this only if your district will tend not to use the Mass Assign Feature or the Assign All Drivers to a Single Trip Feature but instead will retrieve each trip one at a time and then one at a time assign each driver to each trip.



## Using the District Options Billing Tab

The Billing tab on the District Options screen (Figure 4-12) contains specific information on how your district wants T.O.M. format your field trip estimates and invoices. In this section you specify what information to print on these forms.

**District Options**

General Assignment Hours Averaging **Billing** Other Schools / WebTrips Map

**District Billing Comments:** Please Write Trip # on Check

**Allow Trips to be split to multiple customers / funds:** ☒

Custom Fields Garage Checklist Email Options Exit

Figure 4-12. The Billing Tab on the District Options Screen

**District Billing Comments:** This is a line of text that you can enter and have print on all of the field trip invoices and estimates sent to your customer (if you choose to have these comments appear in your Invoice Format). It is 50 characters long. These comments can be a useful tool to communicate general billing instructions (example; Please Make Attn.: Sue Lamor) or to communicate a seasonal message (example; See You In The Fall!).

**Allow Trips to be split to multiple customers / funds:** If this checkbox is checked, the Split button is displayed on the General tab section of the Detailed Field Trip screen. *See Appendix B – Advanced Field Trip Features in your [User's Guide](#) for more information about splitting field trip charges to multiple customers and / or funds.* If this checkbox is unchecked, the Split button is not displayed.



## Using the District Options Other Tab

The Other tab on the District Options screen (Figure 4-13) contains other types of district options not included on the other tabs. The following is a detail description of the fields on the Other tab.

**District Options**

General Assignment Hours Averaging Billing **Other** Schools / WebTrips Map

**Calculate # of Primary Vehicles Needed (default):** ☒ **First Day of the Week:** 1

**Don't add Driver Hours for Non School Days in OT calculation:** ☒

**Automatically calculate Employees OT Hours for a trip (default):** ☒

**Check for driver conflicts when manually assigning drivers:** ☒

**Ignore Arrive and Leave time when calculating driver time:** ☐

**Allow more than one trip with the same schedule to be assigned to same the driver on the same day:** ☐

**Warn if no vehicle was assigned when assigning trips:** ☒

**Trip Prefix:**

Custom Fields Garage Checklist Email Options Exit

Figure 4-13. The Other Tab on the District Options Screen

**Calculate # of Primary Vehicles Needed (default):** This is a default for the assumed value of this field in the field trip screen. If this checkbox is checked (in the Field Trip Screen), T.O.M. automatically calculates the number and types of vehicles needed for the field trip. If this checkbox is unchecked (in the Field Trip Screen), T.O.M. will prompt you to manually enter the number of primary vehicles you wish to use.

**Don't add Driver Hours for Non School Days in OT calculation:** If this checkbox is checked, T.O.M. will not add driver route hours for days marked as non-school days in T.O.M.'s Master Calendar in the OT calculation. If the checkbox is unchecked, T.O.M. ignores non-school days for this calculation.

**Automatically calculate Employees OT Hours for a trip (default):** This is the assumed value of this field in the Field Trip Employee Information Screen. If this checkbox is checked (in the Field Trip Screen), T.O.M. automatically calculates employee's daily and weekly OT hours for a field trip as it does by default. If this checkbox is unchecked (in the Field Trip Screen), T.O.M. will prompt you to determine what hours you wish to consider as OT hours. This gives you the flexibility to indicate hours that are not usually considered OT hours.

**Check for driver conflicts when manually assigning driver time:** T.O.M. allows you to manually assign your drivers and vehicles to field trips. While manually assigning these drivers and vehicles you can have T.O.M. perform its rather extensive conflict checking for any conflicts that may exist with the driver and vehicle you are manually assigning and other field trip assignments, conflicting routes, overtime etc. If T.O.M. finds any conflicts you will be notified of the conflict but still allowed to assign the driver



and vehicle to the field trip. If you do not want the T.O.M. to perform this conflict checking on drivers and vehicles you manually assign to the software then uncheck this check box.

**Ignore Arrive and Leave time when calculating driver time:** When entering the driver's actual hours you can do it two ways: 1. By simply entering the driver's actual hours. 2. By entering the driver's trip times and having T.O.M. calculate the actual hours from these times. When entering the driver's trip times you are allowed to enter four times; start time, arrive time, leave time, end time. Typically the start time is the time the driver starts the field trip, the arrive time is the time the bus arrives at the destination, the leave time is the time the driver leaves the destination and the end time is the time the driver arrives back at the customer's location. If this check box is checked then T.O.M. simply calculates the difference between the start time and the end time to arrive at the driver's actual time. If, however, this checkbox is unchecked then T.O.M. will factor in the arrive time and the leave time into the calculation of the driver's actual time. Specifically, T.O.M. will treat the time between the arrive time and the leave time as time NOT to be part of the driver's actual hours. Let's look at an example.

Driver – Mary just performed a field trip and reported the following times for the field trip:

Start Time: 9:00 AM  
Arrive Time: 10:00 AM  
Leave Time: 12:00 AM  
End Time: 1:00 PM

T.O.M. would calculate Mary's time in one of two ways depending on whether this checkbox was checked or not:

Ignore Arrive and Leave Times – Checked:

Mary's time – 4 Hours

Ignore Arrive and Leave Times – Unchecked:

Mary's time – 2 Hours

**Allow more than one trip with the same schedule to be assigned to the same driver on the same day:**

Normally, T.O.M. considers the same driver assigned to more than one trip on the same day IN THE SAME SCHEDULE to be in conflict and does not allow the driver to be assigned in the auto assignment process and warns the user during the manual assignment process. Many organizations, however, want T.O.M. to allow a driver to have more than one trip assignment on the same day in the same schedule. Those organizations would CHECK this option. By checking this checkbox you are informing T.O.M. to allow a driver to have more than one trip assignment on the same day in the same schedule AS LONG AS THE TWO TRIP ASSIGNMENTS DO NOT OVERLAP IN TIME.

**Warn if no vehicle was assigned when assigning trips:** During automatic assignment of field trips T.O.M. attempts to assign vehicles as well as drivers to the field trips. Sometimes, however, for various reasons T.O.M. can not locate a vehicle to assign to the field trip. When this occurs T.O.M. normally will display a warning message informing the user that no vehicles were assigned to a driver that was assigned to the field trip. Some organizations do not care if T.O.M. assigns vehicles to field trips and would rather not have a warning message displayed when no vehicle was assigned. Those organizations would CHECK this box to tell T.O.M. to suppress any warning message when vehicles are NOT assigned to the field trip.

**Trip Prefix:** T.O.M. allows you to enter a trip prefix that prints in front of your trip number on an invoice. This is helpful, for example, if you have multiple copies of T.O.M. with separate databases. When you do billing and print invoices you could have several invoices with the same field trip number, such as #100. The trip prefix can be used to quickly distinguish which site generated the invoice. To use the prefix, enter the prefix here and then indicate in your invoice format to print the prefix on your invoices.



**NOTE:** The Trip Prefix will only print on the field trip invoice if you have selected it for display in your Invoice Format Template.

**First Day of the Week:** This is the first day of the week that T.O.M. uses when calculating driver's overtime. T.O.M. defaults to 1- Sunday. Many organizations have different start days of the week. Some for example have a Mon-Sun week while others have Sat-Fri. However, you organization starts its you can setup T.O.M. to follow it. The following is a list of the different numbers assigned to the different days. These are the values you can set the First Day of the Week field to:

Number	Day
1	Sunday
2	Monday
3	Tuesday
4	Wednesday
5	Thursday
6	Friday
7	Saturday

## Using the District Options Schools / WebTrips Tab

The Schools / WebTrips tab on the District Options screen (Figure 4. 14) contains fields of district options that are used specifically by the WebTrips product. The following is a detail description of the fields on the Schools / WebTrips tab.

**District Options**

General Assignment Hours Averaging Billing Other **Schools / WebTrips** Map

**WebTrips Screen Comment:**

Allow School Users to view other schools' trips and trip requests: ☐

Custom Fields Garage Checklist Email Options Exit

Figure 4. 14 – The Schools / WebTrips Tab of the District Options Screen

**WebTrips Screen Comment:** Gecko has an add on product to the T.O.M. software called WebTrips that allows your organization to host a Web page that allows individual customers (schools) to log in and submit field trip requests electronically through the Web! WebTrips ultimately sends the field trip request





to T.O.M. for the Transportation Department to accept or reject. WebTrips allows you to enter an unlimited free form comment that appears on the main WebTrips screen. This is a great tool to allow the Transportation Department to broadcast information quickly to all of your schools.

**Allow School Users to view other schools' trips and trip requests:** Different school districts and organizations have different policies regarding whether or not they want schools (customers) to see each others field trips and field trip requests. Many school districts do NOT want their schools to see each other's field trips and field trip requests because they fear this would cause schools to 'spy' on each other's field trip activity and complain if there is a perception that one school is getting more field trip activity than them. Other districts want the schools to see each other's trip activity to determine before entering a trip request if a particular day will likely be too busy to accommodate that next field trip. Whatever your organization's policy T.O.M. can follow it.

If you want your schools to see each other's field trip activity then click on this check box. If on the other hand, you do NOT want your schools to see each other's field trip activity then UNCHECK this checkbox.

## Using the District Options Map Tab

The Map tab on the District Options screen (Figure 4. 15) contains fields of district options that are used specifically by the mapping feature of T.O.M. that works with the Microsoft MapPoint product. The following is a detail description of the fields on the Map tab.

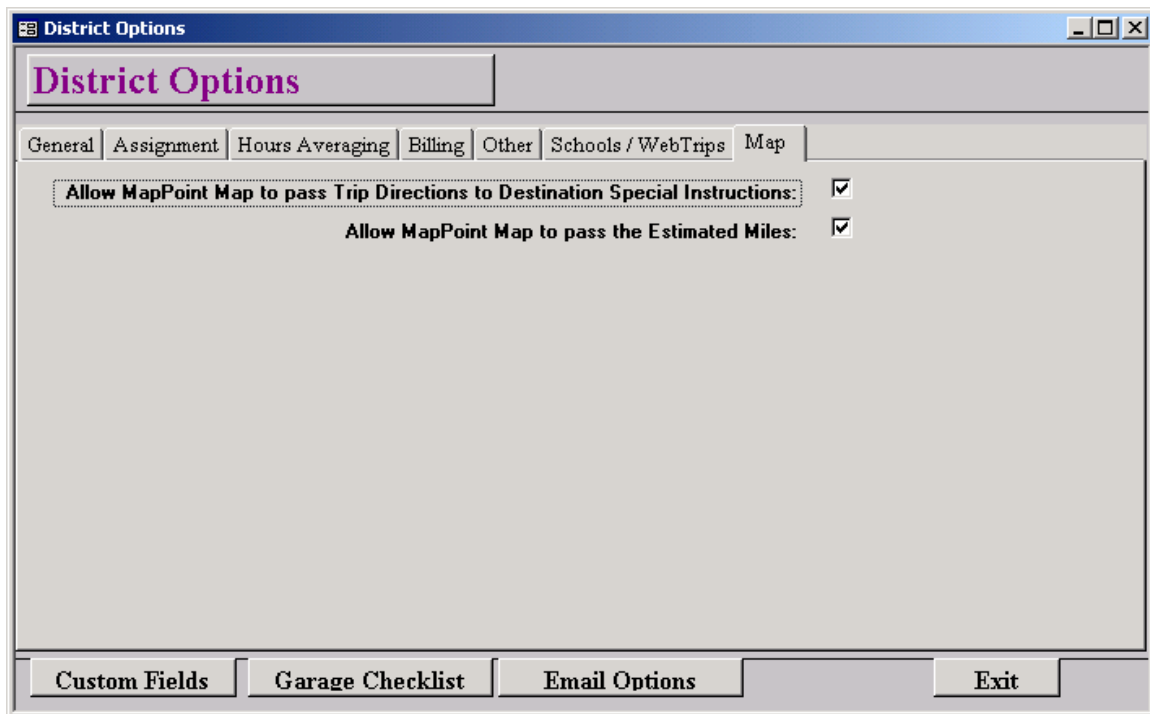


Figure 4. 15– The Map Tab of the District Options Screen

**Allow MapPoint Map to pass Trip Directions to Destination Special Instructions:** When T.O.M. has Microsoft MapPoint create a map of an individual field trip it also has MapPoint create detailed driver directions (lefts and rights). T.O.M. can then take these driver directions and place them in the field trip's destination special instructions. Having the driver directions in the Destination Special Instructions field allows you to later print a trip ticket report for the field trip that will contain the detailed driver directions. On the other hand, you may not want T.O.M. to automatically fill the Destination Special Instructions with



the driver directions automatically because you may already have a robust set of default Destination Special Instructions that you have already setup that you want to continue to use.

If you want T.O.M. to automatically place MapPoint's driver directions into the field trip's Destination Special Instructions then CHECK this checkbox. If on the other hand you DO NOT want T.O.M. to place these driver directions into the Destination Special Instructions then UNCHECK this checkbox.

**Allow MapPoint Map to pass the Estimated Miles:** When MapPoint creates a map for the field trip it will estimate the miles for this trip based on the map drawn. T.O.M. will then take these estimated miles and double them (to make them reflect a round trip) and add any customer base miles to this total and place that total in the field trip's estimated miles. If you do NOT want T.O.M. to do this then UNCHECK this checkbox.



## Using the Custom Fields Option

While in the District Options screen (Figure 4-2) you can click the Custom Fields button, which will cause the Custom Fields screen (Figure 4-16) to display. T.O.M. provides you with fields that allow you to decide what information will be stored and how these fields will be titled on your screens and reports. T.O.M. provides you with five custom text fields and two custom date fields for each employee record and three custom text fields for each vehicle record. You can define these fields ANY time you wish and can later change the definition of these fields. If you decide you don't need to use a field anymore, then simply delete the captions that are assigned to these fields.

The Custom Fields screen allows you to define the captions used for these custom fields. When you assign a custom field a caption, it will automatically appear on either the Employee screen or the Vehicle screen with the caption you have assigned. Give it a try!

The screenshot shows a window titled "CUSTOM FIELDS" with a close button in the top right corner. The window is divided into two main sections: "User Caption for Employee Custom Fields:" and "User Caption for Vehicle Custom Fields:". The Employee section contains five text input fields labeled "Field #1:" through "Field #5:" and two date input fields labeled "Date Field #1:" and "Date Field #2:". The Vehicle section contains three text input fields labeled "Field #1:" through "Field #3:". An "Exit" button is located at the bottom of the window. Three callout boxes provide additional information: one on the left points to the Employee fields, one on the right points to the Employee fields, and one at the bottom left points to the "Exit" button.

**Custom fields that will appear on the Employee Data Entry screen and Employee Roster Report.**

**Custom fields that appear on the Vehicle Data Entry screen and the Vehicle Roster Report.**

**Click to return to the District Options screen the custom fields will automatically be saved.**

Figure 4-16. The Custom Fields Screen



## Using Garage Check List Items

While in the District Options screen (Figure 4-2) you may click the Garage Check List button , which will cause the Garage Check List screen (Figure 4-17) to appear. T.O.M. will automatically print a Garage Check List (Figure 4-18) for each vehicle assigned to a field trip that you have marked as Out of Town. This check list serves to remind the maintenance department to give each vehicle assigned to an out of town field trip a detailed inspection before they take the trip. The Garage Check List screen allows you to customize the check list to meet your district's requirements. If you enter text in one of the check list boxes a check box and your text will appear on the garage check list that prints out. T.O.M. allows you to define up to 28 check list items. These items are grouped into two sections that are marked Garage Check Item and Overall Item.

The screenshot shows a window titled "GARAGE CHECK LIST" with a sub-header "Garage Check List". It contains two columns of input fields for check list items. The left column is labeled "Garage Check Item" and the right column is labeled "Overall Item". Both columns have 10 numbered entries. An "Exit" button is located at the bottom left. Three callout boxes provide instructions: one for the Exit button, one for the "Garage Check Item" section, and one for the "Overall Item" section.

Garage Check Item	Overall Item
#1: CHECK TIRE AIR PRESSURE	#1: ALL LIGHTS
#2: CHECK FOR TIRE WEAR	#2: WIPER BLADES AND OPERATION
#3: COMPLETE VISUAL CHECK	#3: DRIVE TRAIN
#4: CHAINS ( IF APPLICABLE )	#4: EXHAUST SYSTEM
#5:	#5: ALL FLUID LEVELS
#6:	#6: FRONT SUSPENTION TIE RODS, E.
#7:	#7: CHECK LUG NUTS
#8:	#8: HOSES & BELTS
#9:	#9: VEH. GENERAL RUNNING CONDIT
#10:	#10:
	#11:
	#12:
	#13:
	#14:
	#15:
	#16:
	#17:
	#18:

**Exit**

Click to return to the District Options screen the Garage Check List items will be automatically saved.

Custom check list items that will appear in the first section of the Garage Check Sheet.

Custom check lists items that will appear in the second section of the Garage Check Sheet.

Figure 4-17. The Garage Check List Screen



5/24/00	DEPARTMENT OF TRANSPORTATION		
<b><i>GARAGE CHECK LIST</i></b>			
VEHICLE: 105	TRIP DATE: 4/17/2000		
MECHANIC: _____			
TRIP #: 10980			
DESTINATION: ST AGNES ELEM.	PHOENIX	AZ	
<b>CHECK:</b>			
<input type="checkbox"/>	CHECK TIRE AIR PRESSURE		
<input type="checkbox"/>	CHECK FOR TIRE WEAR		
<input type="checkbox"/>	COMPLETE VISUAL CHECK		
<input type="checkbox"/>	CHAINS ( IF APPLICABLE )		
<b>OVERALL:</b>			
<input type="checkbox"/>	ALL LIGHTS		
<input type="checkbox"/>	WIPER BLADES AND OPERATION		
<input type="checkbox"/>	DRIVE TRAIN		
<input type="checkbox"/>	EXHAUST SYSTEM		
<input type="checkbox"/>	ALL FLUID LEVELS		
<input type="checkbox"/>	FRONT SUSPENSION TIE RODS, ETC.		
<input type="checkbox"/>	CHECK LUG NUTS		
<input type="checkbox"/>	HOSES & BELTS		
<input type="checkbox"/>	VEH. GENERAL RUNNING CONDITION		
VEHICLE GENERAL RUNNING CONDITION: _____			
_____			
_____			
SIGNATURE: _____ DATE: _____			

Figure 4-18. A Sample Garage Check List



## Using the Email Options

While in the District Options screen (Figure 4-2) you can click the Custom Fields button, which will cause the Email Options screen (Figure 4. 19) to display. T.O.M. allows your organization to enter up to three email address on each field trip. T.O.M. has several predefined events that can cause T.O.M. to automatically generate an email message to any one of these three email addresses. In the Email Options Screen you can instruct T.O.M. which of these predefined events will cause an email message to automatically be sent and to whom (in general) that (or those) email(s) will be sent to. Below is a detailed discussion of all of the options you can work with this screen.

**Email Options**

**Requestor:**

- Status changes in Web Trips: ☐
- Accepted by Transportation Department: ☒
- Denied by Transportation Department: ☒
- New Trip entered into dispatch database: ☐
- Trip Assigned a driver and vehicle: ☒
- Trip Canceled: ☒
- Trip Billed: ☒
- Trip paid: ☐

**Administrator:**

- Status changes in Web Trips: ☐
- Accepted by Transportation Department: ☐
- Denied by Transportation Department: ☐
- New Trip entered into dispatch database: ☐
- Trip Assigned a driver and vehicle: ☐
- Trip Canceled: ☒
- Trip Billed: ☐
- Trip paid: ☐

**Approver:**

- Status changes in Web Trips: ☒
- Accepted by Transportation Department: ☐
- Denied by Transportation Department: ☐
- New Trip entered into dispatch database: ☐
- Trip Assigned a driver and vehicle: ☐
- Trip Canceled: ☐
- Trip Billed: ☐
- Trip paid: ☐

**Exit**

Figure 4. 19 – The Email Options Screen



## The Email Recipients

As was stated previously T.O.M. allows you to enter up to three email address per field trip. These addresses are called:

Requestor  
Approver  
Administrator

These titles are nothing more than a way to distinguish between the three email addresses. They could have been called Email Address 1, 2 and 3. You do NOT have to be concerned that only the email address of the actual person requesting the field trip can be entered in the Requestor address on the field trip. NOTE: Gecko highly recommends that you are consistent with the type of person who's address goes in each of these three addresses in all of your field trips. If not then you might find you have unintended Emails sent to wrong parties.

In the Email Options screen each of these three Email addresses can have an email automatically sent for each of the predefined events. Each of these events is discussed below. T.O.M. allows more than one address to receive the same Email for the same event.

## The Predefined Events

T.O.M. is preprogrammed to automatically send an email when each of these events occur IF you have instructed T.O.M. to do so for any one of the three email addresses and IF there is actually an Email address in the specific field trip that had the event occur to it for the person that is suppose to receive the email. These preprogrammed events are represented as check boxes for each of the three email addresses. If the event is checked then T.O.M. will automatically send an email to each email address in the specific trip that is checked in this screen for that event. T.O.M. uses the predefined Email Templates that you can customize for each event to guide it on how the email message is to be composed. For more information on Email Templates see Chapter 12 – Email Templates later on in this book. Figure 4. 20 is a detailed discussion of each of these predefined events and when they have an email message automatically sent if the event is checked for any of the three email addresses:

***NOTE: This option will only work if your default Email Client uses and Email standard format known as MAPI. If your default Email Client uses another Email format such as POP3 then this feature will not work.***



<b>T.O.M. Event</b>	<b>Event Description</b>
Trip Request was Accepted by Transportation Department	Email is generated when the user clicks on the Accept Button in the Field Trip Request Screen.
Trip Request was Denied by Transportation Department	Email is generated when the user clicks the Denied Button in the Field Trip Request Screen
A new field trip was entered in the dispatching database	Email is generated when the user enters a field trip directly into the dispatching database by clicking the New button in the Work With Field Trips Screen.
A field trip request's status was changed by it being approved by an approver (other than the Transportation Department) in WebTrips.	Email is generated when a WebTrips approver either approves or denies a field trip request in WebTrips.
An unassigned field trip was assigned a driver and vehicle	Email is generated either when an unassigned trip has a driver and vehicle automatically assigned by T.O.M. or when an unassigned trip is manually assigned a driver and vehicle.
An unbilled field trip was billed.	Email is generated when the field trip is either billed individually or billed in the Mass Bill feature.
A field trip is canceled.	Email is generated when the user clicks the Cancel Trip button in the Work with Field Trip Screen.
A field trips billed amount was paid.	Email is generated when the unpaid billed balance of a field trip is paid when user enters a payment in the Bills & Payments screen.

Figure 4. 20 - List of Predefined Events that Can Cause T.O.M. to Automatically Send an Email Message