

Appendix B

Advanced Field Trip Features

T.O.M. offers several advanced field trip features that truly makes it “the most powerful field trip software on the planet!” This chapter describes the following features:

- Charging a Trip to Multiple Customers and/or Funds
- Working with Multiple Destination Field Trips
- Working with Shuttle Trips – One Driver Dropping Off and Another Driver Picking Up
- Specifying Special Driver Characteristics
- Entering Driver Bids for a Field Trip

NOTE: If you wish to learn about working with T.O.M.’s basic field trip features, see *Chapter 1 – Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* in this manual. You’ll find details about the following features:

- Entering Field Trips
- How T.O.M. Automatically Calculates the Number of Vehicles Needed for a Field Trip
- Entering Multiple Day Field Trips
- Retrieving An Existing Field Trip Using the Trip Number
- Retrieving An Existing Field Trip Using the Field Trip Search Screen
- Deleting A Field Trip
- Printing Field Trip Estimates for Customers



Charging a Trip to Multiple Customers and/or Funds

Many times you may have multiple customers (schools) that take the same field trip together. These customers will then expect you to split the cost of the field trip to the different to each of these customers. Or a customer may instruct you to split the cost of the field trip to multiple funds. T.O.M. makes it easy to bill multiple customers and / or charge the field trip against multiple funds. This is done from the Detailed Field Trip screen by clicking the Split button on the General tab (Figure B-1).

Click the Split button to bill multiple customers and / or charge the field trip against multiple funds.

Figure B-1. Accessing the Split Trip Charges Screen

When you click the Split button, the Trip Splits screen is displayed (Figure B-2). This screen shows all a splits for this field trip. From this screen you can add new splits, change existing splits or delete existing splits.

Adding a Trip's Splits

If you wish to add a new trip split, click the New button on the Trip Split Charges screen (Figure B-2) and you will be taken to the Trip Charge Split screen (Figure B-3). This screen will let you enter all of the split information. To save the split information you have entered, click the OK button. To exit this screen without saving the split information you have entered, click the Exit button.

Note: The split button is only visible if you checked the 'Allow Trips To Be Split To Multiple Customers / Funds' check box in the Billing Section of the District Options screen. *For more information about this field see Chapter 4 – District Options in your [Getting Started Manual](#).*

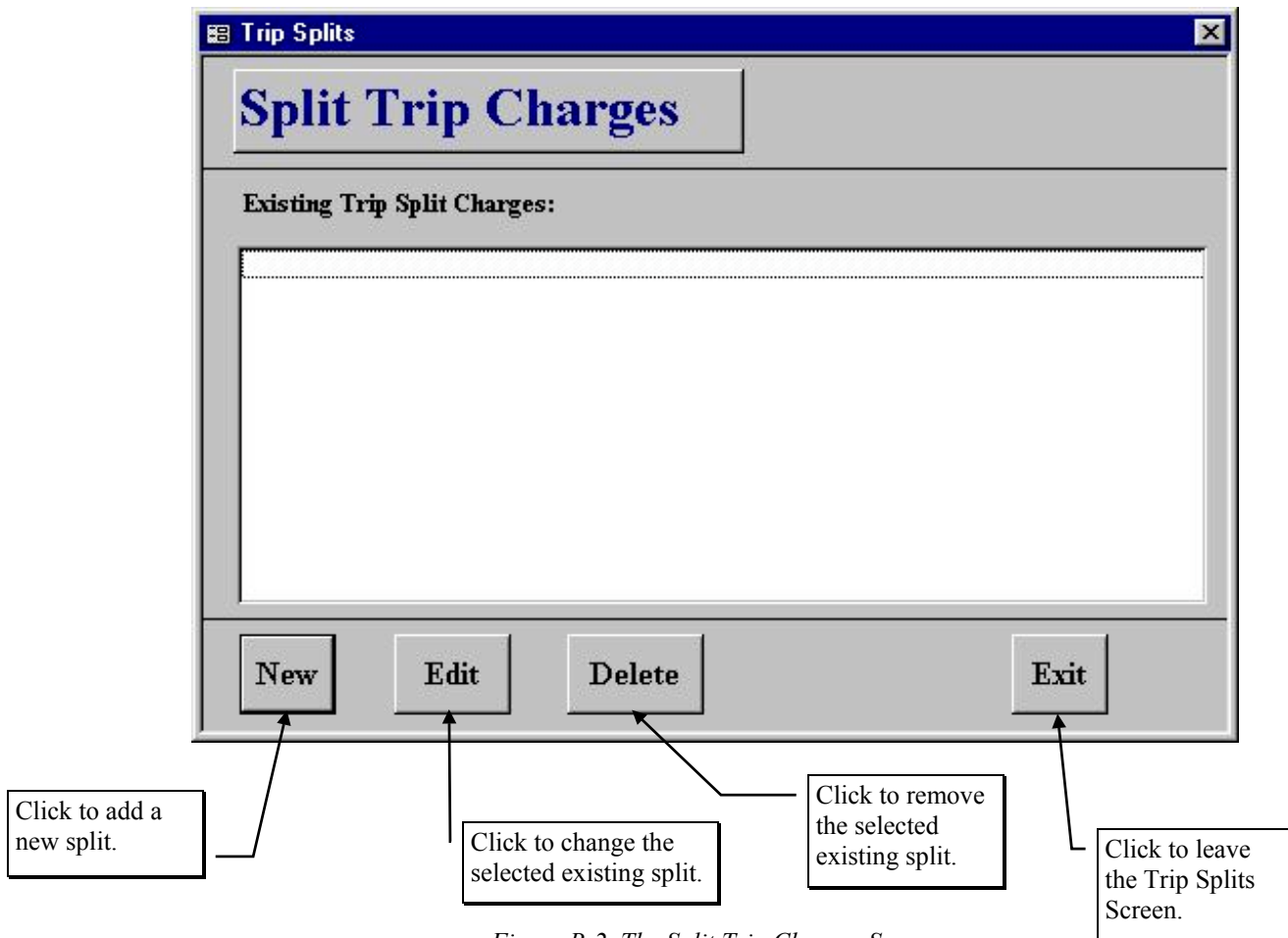


Figure B-2. The Split Trip Charges Screen

Click the New button from the Split Trip Charges screen for each split you wish to add. See *Trip Charge Split Screen Options* below for a complete description of the data entry fields and options.

Figure B-3. The Trip Charge Split Screen



Figure B-4. Existing Trip Split Charges Might Look Like This

When you have finished entering your trip split charges, click the Exit button. The Detailed Field Trip screen is again displayed. Notice that the Split button is now a yellow Split button, which indicates that a trip split exists (Figure B-5).

NOTE: You will not be allowed to exit the Trip Splits screen if any of the following conditions are true:

- You have created only 1 split record. You must have at least 2 split records (or why bother entering a split).
- The total percentage of all the split records must add up to exactly 100%. If not an error will display.
- At least one of the trip split records must NOT have a Maximum Amount To Split. This is because we don't know how much the trip will bill for until it is performed and if all of the splits have a max amount there is a chance that the totals of the max amounts could be not equal to the trip billed amount.



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 Calc

Estimated Miles: 30.00

Purpose :

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

The Split button changes to a yellow Split button when Split Trip Charges exist.

Figure B-5. The Split Button Changes to a Yellow Button When Split Trip Charges Exist

Changing an Existing Trip's Splits

If you wish to change an existing trip split, then select a trip split on the Trip Splits screen (Figure B-2) by clicking the row containing the desired trip split and then click the Edit button. You will be taken to the Trip Charge Split screen (Figure B-3), which will let you change any of the split information. To save the split information you have changed, click the OK button. To exit this screen without saving the split information you have entered, click the Exit button. See *Trip Charge Split Screen Options* below for a complete description of the data entry fields and options.

Deleting an Existing Trip's Splits

To remove an existing trip split, then select a trip split on the Trip Splits screen (Figure B-2) by clicking the row containing the desired trip split and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this trip split. If you do confirm to T.O.M. that you want to delete the trip split, T.O.M. will remove the trip split from your T.O.M. database.

Trip Charge Split Screen Options

The following describes the data entry fields and options for the Trip Charge Split screen (Figure B-3).

Customer button: This is the number of the customer to bill. You can enter the customer number here or click the drop-down arrow and select the customer from the list of customers displayed. If you don't know



the customer number you can look it up by the customer name. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Manual* for details about searching for customers.

Fund button: This is the fund that the field trip is charged against. This field is also a drop down list box. You can enter the fund number here or click the drop-down arrow and select the fund from the list of funds displayed. If you don't know the fund number you can look it up by the fund name. See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Manual* for details about searching for funds.

Split %: Enter the percentage of the bill you wish to charge for this customer and / or fund, from 1% to 99%. (You could enter 0% or 100%, but that would defeat the purpose of a split charge!) . Enter as a decimal. For example, enter 50% as .50.

Maximum Amount of Split: The maximum amount this split will bill for. For example, if the split is 50% with a maximum amount of \$2,500.00, T.O.M. will bill 50% of the trip up to that amount. After the maximum amount is reached, the balance will be distributed to the other customers or funds.

At least one of the trip split records must NOT have a Maximum Amount To Split. This is because we don't know how much the trip will bill for until it is performed and if all of the splits have a max amount there is a chance that the totals of the max amounts could be not equal to the trip billed amount.



Working with Multiple Destination Field Trips

Many times a field trip will not go to a single destination but to many destinations. For example, a field trip may first go to the bread factory at 9:00 AM, then the stuffed animal factory at 11:00 AM and finally, to the park for lunch at 12:30 PM before returning to the customer's site at 2:15 PM. Don't worry T.O.M. can handle these kind of field trips.

If a field trip requires more than one destination you can specify them from the Detailed Field Trip screen by clicking the **Multi-Dest.** button on the Assignment tab (Figure B-6).

Click the Assignment Tab.

Click the Multi-Dest. button to specify more than one destination for your field trip.

Figure B-6. Accessing the Multiple Trip Destinations / Legs Screen

When you click the Multi-Dest. Button, the Multiple Destinations / Legs screen is displayed (Figure B-7). This screen shows all the destination legs for this field trip. From this screen you can add new destination legs, change existing destination legs or delete existing destination legs.



Adding a Trip's Multiple Destinations

We call the description of one destination to another (or from the customer site to a destination or vice versa) a 'destination leg'. For example, leave the stuffed animal factory at 12:00 PM and go to the park for lunch at 12:30 PM. This would be one destination leg.

If you wish to add a new destination leg, click the New button on the Multiple Trip Destinations / Legs screen (Figure B-7) and you will be taken to the Trip Additional Destination Leg screen (Figure B-8). Click the New button from the Multiple Destination / Legs screen for each destination leg you wish to add.

NOTE: You must enter more than one destination leg; otherwise there is no point in using the multi-destination feature.



Figure B-7. The Multiple Destination / Legs Screen with No Trips Added Yet

The Trip Additional Destination Leg screen (Figure B-8) will let you enter all the destination leg information. See *Trip Additional Destination Leg Screen Options* below for a complete description of the data entry fields and options.



The screenshot shows a software window titled "Trip Additional Destination Leg". It contains two main sections: "Start Location" and "End Location", each with fields for Name, Address #1, Address #2, and City/State/Zip. The "Start Location" section is highlighted with a green border and contains the text "NORTH CANYON HIGH SCHOOL", "1700 E. UNION HILLS", and "PHOENIX AZ 85024". The "End Location" section is highlighted with a yellow border and contains the text "HERBERGER THEATER", "222 E. MONROE", and "PHOENIX AZ". To the right of these sections is a "Leg Times" section with fields for Start Time (8:00 AM), Arrive Time, Leave Time, End Time (1:00 PM), and Estimated Time of Leg (5.00). At the bottom of the window are "OK" and "Exit" buttons. Two callout boxes with arrows point to these buttons: one for "OK" stating "Click to save the destination leg information you have entered." and one for "Exit" stating "Click to leave without saving the information."

Trip Additional Destination Leg

Start Location:

Set to Customer Set to Destination Search

Name: NORTH CANYON HIGH SCHOOL Customers

Address #1: 1700 E. UNION HILLS Destinations

Address #2:

City/State/Zip: PHOENIX AZ 85024

End Location:

Set to Customer Set to Destination Search

Name: HERBERGER THEATER Customer

Address #1: 222 E. MONROE Destination

Address #2: 2ND ST & VANBUREN

City/State/Zip: PHOENIX AZ

Leg Times:

Start Time: 8:00 AM

Arrive Time:

Leave Time:

End Time: 1:00 PM

Estimated Time of Leg: 5.00

Calc Hours

OK Exit

Click to save the destination leg information you have entered.

Click to leave without saving the information.

Figure B-8. The Trip Additional Destination Leg Screen

To save the destination leg information you have entered, click the OK button. The Multiple Trip Destinations / Legs screen will again be displayed showing the trip you added (Figure B-9). To exit the Trip Additional Destination Leg screen without saving the destination leg information you have entered, click the Exit button.

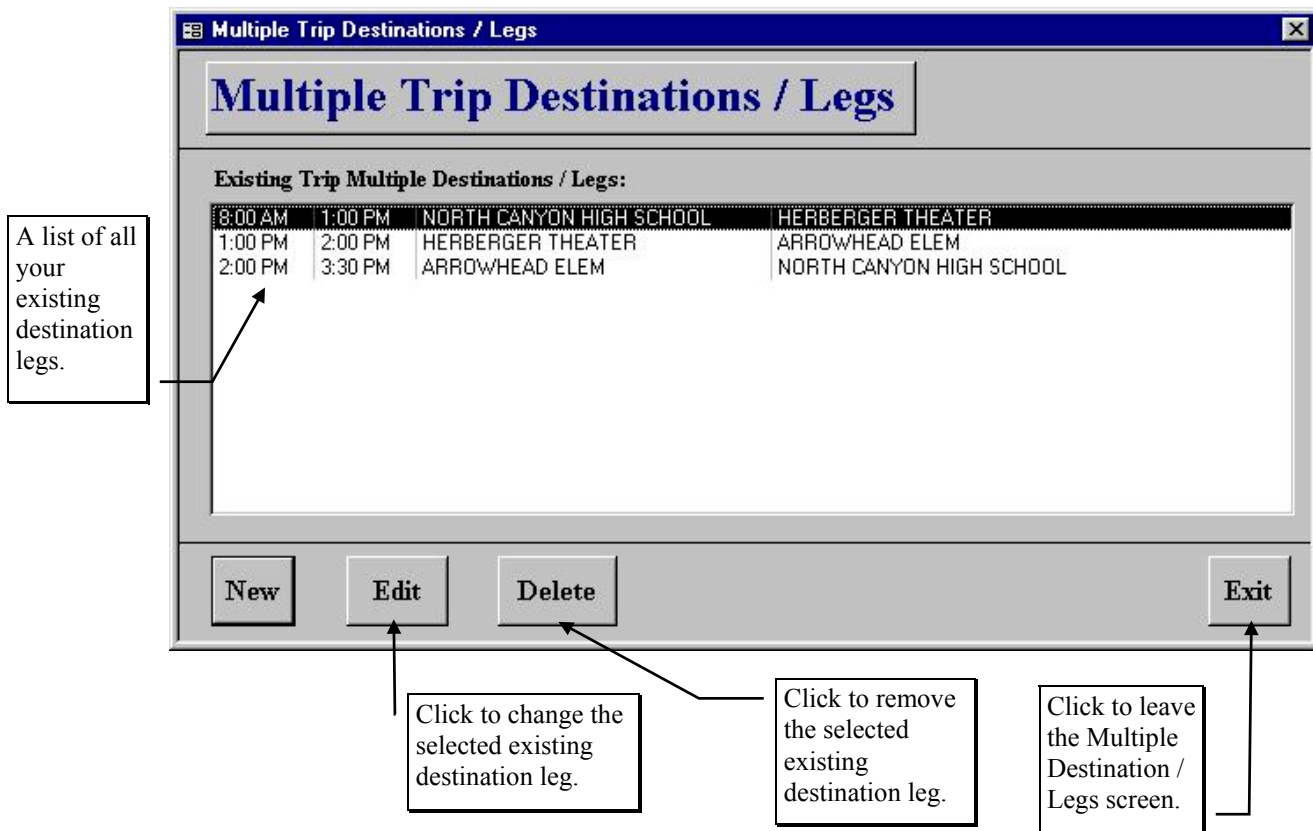


Figure B-9. Existing Trip Destinations / Legs Might Look Like This

When you have finished entering your destination legs, click the Exit button. The Detailed Field Trip screen is again displayed. Notice that the Multi-Dest. button is now a yellow Multi-Dest. button, which indicates that multiple destination legs exists (Figure B-10).

NOTE: You must enter more than one destination leg or T.O.M. will not let you exit the Trip Additional Destination Leg screen. Otherwise there would be no point in using the multi-destination feature.



T.O.M. - Transportation Operations Manager

Field Trip

Field Trip Request #: 0

General Instructions **Assignment** Billing Other

Vehicles / Capacity

Calculate # of Primary Vehicles Needed: ☒

Primary Veh Type: 1

of Primary Veh: 1

Addit. Veh Type:

of Addit. Veh: 0

Capacity: Low

Ticket Template: TOM_TICKET

Schedules

Schedule #1: MD

#2:

#3:

#4:

#5:

Shuttle Trip: ☐

Multi-Dest.

Characteristics

Allow Auto Assign: ☒

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

The Multi-Dest. button is now a yellow Multi-Dest. button, which indicates that multiple destination legs exists.

Figure B-10. The Multi-Dest. Button Changes to a Yellow Button When Multiple Destinations Exist

Changing an Existing Trip's Multiple Destinations

If you wish to change an existing destination leg, then select a destination leg on the Multiple Destination / Legs screen (Figure B-7) by clicking the row containing the desired destination leg and then click the Edit button. You will be taken to the Trip Additional Destination Leg screen (Figure B-8), which will let you change any of the destination leg information. To save the destination leg information you have changed, click the OK button. To exit this screen without saving the destination leg information you have entered, click the Exit button. See *Trip Additional Destination Leg Screen Options* below for a complete description of the data entry fields and options.

Deleting an Existing Trip's Multiple Destinations

To remove an existing destination leg, then select a destination leg on the Multiple Destination / Legs screen (Figure B-7) by clicking the row containing the desired destination leg and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this destination leg. If you do confirm to T.O.M. that you want to delete the destination leg, T.O.M. will remove the destination leg from your T.O.M. database.



Trip Additional Destination Leg Screen Options

The following describes the data entry fields and options for the Trip Additional Destination Leg screen (Figure B-8).

Start Location: This is the location where this leg of the field trip begins. You can enter the name and address information or click the **Set to Customer** or **Set to Destination** buttons. Clicking the **Set to Customer** button automatically fills the trips' customer name and address into the start location fields. Clicking the **Set to Destination** button automatically fills the trip's destination name and address into the start location fields.

If you want to select a predefined customer site then click the **Customer** button to look up your customers by the name. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

If you want to select a predefined destination site then click the **Destination** button to look up your destinations by name. See *Chapter 8 – Destinations* in the *T.O.M. Getting Started Guide* for details about searching for destinations.

End Location: This is the location where this leg of the field trip ends. You can enter the name and address information or click the **Set to Customer** or **Set to Destination** buttons. Clicking the **Set to Customer** button automatically fills the trips' customer name and address into the start location fields. Clicking the **Set to Destination** button automatically fills the trip's destination name and address into the start location fields.

If you want to select a predefined customer site then click the **Customer** button to look up your customers by the name. See *Chapter 5 – Customers* in the *T.O.M. Getting Started Guide* for details about searching for customers.

If you want to select a predefined destination site then click the **Destination** button to look up your destinations by name. See *Chapter 8 – Destinations* in the *T.O.M. Getting Started Guide* for details about searching for destinations.

Leg Times: These are the times when this leg of the field trip takes place. As with all time fields in T.O.M. the time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a time of 8:30 AM you need only type 0830am.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. See *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

- **Start Time: Required** - This is the time that this leg of the field trip begins. You must enter this time.
- **Arrive Time: Optional** - This is the time that this leg of the field trip arrives at its destination. You do not have to enter this time.
- **Leave Time: Optional** - This is the time that this leg of the field trip leaves the destination to either begin the next leg or return. You do not have to enter this time.
- **End Time: Required** - This is the time that this leg of the field trip is complete. You must enter this time.
- **Estimated Time of Leg:** Enter the time yourself or click the Calc button to have T.O.M. automatically calculate the estimate leg time.



Working with Shuttle Trips

When a field trip requires that one driver take the passengers to the destination and then leave the passengers and later a second driver comes to the destination and pick up those passengers and return them to the customer site it's called a 'Shuttle Trip' by T.O.M.

A Shuttle Trip can actually have more than two drivers. For example, the trip could require that two drivers take the passengers to the destination site and different two drivers go to the destination site and pick up the passengers and return them back to the customer's site.

If a field trip requires one driver to drop off the field trip participants and a different driver to pick them up for the return trip, you can specify this requirement from the Detailed Field Trip screen by clicking the Shuttle Trip checkbox on the Assignment tab (Figure B-6).

Designating a Field Trip as a Shuttle Trip

Let's look at what happens when you designate a field trip as a shuttle trip. Figure B-11 shows a typical field trip as seen first from the General tab on the Detailed Field Trip screen.

T.O.M. - Transportation Operations Manager

Field Trip Field Trip Request #: 1675

General Instructions Assignment Billing Other

Field Trip #: 9533

Request Date: 9/20/1999 Drop / Return: ☐

Customer: 47 COPPER CANYON ELEM

Contact: Becky Shaffer

Destination: 84 ARIZONA STATE CAPITAL

Out of Town: ☐ 1700 WEST WASHINGTON

Split Fund: 8

Dates / Times Passengers / Miles / Purpose

Departure: 5/5/2000

Return: 5/5/2000

Departure Time: 9:15 AM

Arrival Time: 10:30 AM

Leave Time: 12:45 PM

Return Time: 1:30 PM

Calendar

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

Figure B-11. A Typical Field Trip You Might Need to Designate as a Shuttle Trip



Click the Assignment tab where the Shuttle Trip checkbox is located (Figure B-12). Notice that the checkbox is not checked yet.

T.O.M. - Transportation Operations Manager

Field Trip Request #: 1675

General Instructions **Assignment** Billing Other

Vehicles / Capacity

Calculate # of Primary Vehicles Needed: ☒

Primary Veh Type: 1

of Primary Veh: 1

Addit. Veh Type:

of Addit. Veh: 0

Capacity: High

Ticket Template: TOM_TICKET

Schedules

Schedule #1: MD

#2:

#3:

#4:

#5:

Shuttle Trip: ☐

Multi-Dest.

Characteristics

Allow Auto Assign: ☒

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

The Shuttle Trip checkbox, located on the Assignment tab, is not yet checked.

Figure B-12. The Shuttle Trip Checkbox is Located on the Assignment Tab

When you check the Shuttle Trip checkbox, the Multi-Dest. button changes to a yellow Multi-Dest. button (Figure B-13), indicating that the trip has multiple destination legs. T.O.M. then creates two destination legs:

- The first destination leg starts at the customer location and ends at the destination location.
- The second destination leg starts at the destination location and ends at the customer location.

You can view and change the multiple destinations by clicking the yellow Multi-Dest. button on the Assignment tab (Figure B. 14). See *Working with Multiple Destination Field Trips* earlier in this appendix for details about viewing and working with the multiple destination screens.



NOTE: T.O.M. uses the Departure Time, Arrival Time, Leave Time and Return Time entries to create the two destination leg times. If the Arrival Time and Leave Time fields are blank, this may cause some rather strange leg times.

Normally the first destination leg will have a Start Time set at the Departure Time of the field trip and an End Time set to the Arrival Time of the field trip. The second destination leg will have the Start Time set to the Leave Time of the field trip and the End Time set to the trip's Return Time.

What if the trip's Arrive Time and Leave Time are left blank?

Then T.O.M. make an admittedly poor guess at the destination leg times. When the trip's Arrive Time and Leave Time are left blank and the trip is marked as a Shuttle Trip then T.O.M. will; 1. Set the first destination leg's Start Time to the trip's Departure Time and the End Time to the trip's Return Time. 2. Set the second destination leg's Start Time and Return Time both to the trips Return Time.

Removing a Shuttle Trip

To remove a shuttle trip, simply uncheck the Shuttle Trip checkbox on the Detailed Field Trip screen's Assignment tab. T.O.M. deletes the multiple destinations legs and returns the Mult-Dest. button from yellow to black.

T.O.M. - Transportation Operations Manager

Field Trip Field Trip Request #: 1675

General Instructions **Assignment** Billing Other

Vehicles / Capacity

Calculate # of Primary Vehicles Needed: ☒

Primary Veh Type:

of Primary Veh:

Addit. Veh Type:

of Addit. Veh:

Capacity:

Ticket Template:

Schedules

Schedule #1:

#2:

#3:

#4:

#5:

Shuttle Trip: ☒

Multi-Dest

Characteristics

Allow Auto Assign: ☒

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

Click the Shuttle Trip checkbox when one driver drops off and another driver picks up. The Multi-Dest. button changes to a yellow button.

Figure B-13. Specifying Shuttle Trips When One Driver Drops Off and Another Driver Picks Up



O.K., I've created this shuttle trip. Now, how do I assign drivers to it?

The same way you assigned drivers with other field trips; either with T.O.M.'s various methods of automatically assigning drivers to a field trip or manually assigning a driver to a field trip within T.O.M. using the Manually Add A Driver Screen.

T.O.M.'s Automatic Assignment feature will automatically assign twice as many drivers as a trip normally requires if it is marked as a Shuttle Trip. When checking the prospective driver's to be assigned to the Shuttle Trip for conflicts T.O.M. will check to see if the various Destination Leg's do NOT conflict the candidate driver's other field trips, routes or overtime restrictions. When T.O.M. finds a destination leg that is compatible with the candidate driver, then that driver is assigned to both the trip and the destination leg with the trip. *For more information about how T.O.M.'s Automatic Assignment feature works see Chapter 2 in this manual.*

If you are assigning the driver's to a Shuttle Trip manually T.O.M. will automatically prompt you for the destination leg that the driver is being assigned to.

Once a driver has been assigned to a destination leg of a Shuttle Trip T.O.M. will automatically instruct the driver where he /she is picking up and dropping off the passengers on the driver's Trip Ticket based on which destination leg the driver is assigned to.

Existing Trip Multiple Destinations / Legs:			
9:15 AM	10:30 AM	COPPER CANYON ELEM	ARIZONA STATE CAPITAL
12:45 PM	1:30 PM	ARIZONA STATE CAPITAL	COPPER CANYON ELEM

Figure B. 14. T.O.M. Creates Multiple Trip Destination Legs When You Designate the Shuttle Trip



Specifying Special Driver Characteristics

If you need to specify special driver characteristics for a field trip, such as a driver certified for driving on mountain roads. You can do this from the Detailed Field Trip screen by clicking the Characteristics button on the Assignment tab (Figure B-15).

Some field trips need drivers that have special abilities or training. T.O.M. allows you to create a list of driver characteristics and assign those characteristics to your drivers. T.O.M. then allows you to specify if a field trip requires that only drivers with certain characteristics should be assigned to that trip.

NOTE: This feature should be used sparingly. A more efficient way to achieve the same affect is to set up a different schedule.

For example, rather than setting up a driver characteristic of ‘Mountain Roads’ to indicate that a driver is certified to drive on mountain roads it would be better if you setup a mountain roads schedule and enroll those drivers that are mountain road certified. Then if a field trip requires a driver that is certified to drive on mountain roads you can just set the field trips schedule to the mountain roads schedule when entering the field trip into T.O.M.

Why is this way better than using the Driver Characteristics feature?

When the auto assign procedure is checking a driver for a characteristic then it simply keeps trying and skipping drivers in the schedule until it finds a driver with the required driver characteristic. So if you have 50 drivers in a schedule and only two have the required driver characteristic T.O.M. could in theory try and skip dozens of drivers before one of those two drivers would be assigned to the field trip. If, however, you used a schedule that only had drivers with the required skills then T.O.M. would not have to try and skip some many other drivers when assigning drivers to this field trip.

If using Schedules is better than using Driver Characteristics why bother using the Driver Characteristics Feature at all?

You would use the Driver Characteristics feature because you may already have created many schedules to group your drivers by geographic zones and / or times of availability. If you then had to further divide and group your drivers by various skills it may cause the total number of schedules to be too unwieldy. Or perhaps a field trip may require drivers with various multiple combinations of driver characteristics. For example, field trip 100 requires that the driver assigned to perform this trip be mountain road certified and lift chair certified.



T.O.M. - Transportation Operations Manager

Field Trip Field Trip Request #: 1124

General Instructions **Assignment** Billing Other

Vehicles / Capacity

Calculate # of Primary Vehicles Needed: ☒

Primary Veh Type:

of Primary Veh:

Addit. Veh Type:

of Addit. Veh:

Capacity:

Ticket Template:

Schedules

Schedule #1:

#2:

#3:

#4:

#5:

Shuttle Trip: ☐

Multi-Dest. ☐

Characteristics

Allow Auto Assign: ☒

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

Click the Characteristics button to specify special driver characteristics for your field trip.

Figure B-15. Click the Characteristics Button to Specify Special Driver Characteristics

When you click the Characteristics button, the Driver Characteristics Required for Field Trip Assignment screen is displayed (Figure B-16). This screen displays all the driver characteristics you have created and allows you to select the characteristics you wish to specify for the trip. (See *Chapter 3 – Entering Lookup Lists* in the *T.O.M. Getting Started Manual* for details about creating driver characteristics.)

Use the Add>>, <<Remove, Add All and Remove All buttons to move the characteristics to or from the Characteristics required for drivers of this trip list. Figure B-17 shows the certified for driving mountain roads characteristic added. When T.O.M. assigns drivers only those with ALL these characteristics will be considered for assignment. (Of course all other assignment factors are also considered.)



Trip Characteristics

Driver Characteristics Required for Trip Assignment

Please select the characteristic that you require for drivers assigned to this trip:

Trip:

Available Characteristics :

Mountain Roads	Certified to drive on mountain road
Snow	Certified to drive in Snow

Characteristics required for drivers of this trip:

Buttons: Add>>, <<Remove, Add All, Remove All

Exit

Figure B-16. The Driver Characteristics Required for Field Trip Screen

Trip Characteristics

Driver Characteristics Required for Trip Assignment

Please select the characteristic that you require for drivers assigned to this trip:

Trip:

Available Characteristics :

Mountain Roads	Certified to drive on mountain road
Snow	Certified to drive in Snow

Characteristics required for drivers of this trip:

Mountain Roads	Certified to drive on mountain roads
----------------	--------------------------------------

Buttons: Add>>, <<Remove, Add All, Remove All

Exit

To add a single characteristic, click on the characteristic here and then click the Add>> button. Or click the Add All button to add all the characteristics.

To remove a single characteristic, click on the characteristic here and then click the <<Remove button. Or click the Remove All button to remove all the characteristics.

Figure B-17. Add and Remove Driver Characteristics Using the Buttons Between the Lists



When you are finished, click the Exit button. The Detailed Field Trip screen is again displayed. Notice that the Characteristics button is now a yellow Characteristics button, which indicates that required characteristics exists (Figure B-10)

T.O.M. - Transportation Operations Manager

Field Trip Field Trip Request #: 1124

General Instructions **Assignment** Billing Other

Vehicles / Capacity

Calculate # of Primary Vehicles Needed: ☒

Primary Veh Type: 1

of Primary Veh: 1

Addit. Veh Type:

of Addit. Veh: 0

Capacity: High

Ticket Template: TOM_TICKET

Schedules

Schedule #1: MD

#2:

#3:

#4:

#5:

Shuttle Trip: ☐

Multi-Dest.

Characteristics

Allow Auto Assign: ☒

OK Save Addit. Trip Dates Auto Assign Drivers Trip Driver Info Print Trip Ticket Print Est. Bills and Pymts Bill Trip Cancel Trip Exit

The Characteristics button is now a yellow Characteristics button, which indicates that required characteristics exists.

Figure B-18. The Characteristics Button Changes to a Yellow Button When Required Characteristics Exist

NOTE: If you remove all required characteristics from the Driver Characteristics Required for Field Trip Assignment screen (Figure B-17), T.O.M. returns the Characteristics button from yellow to black.



Entering Driver Bids for a Field Trip

If you are using the Bid Allowance method of assigning drivers to field trips then a key requirement of this method is the enter the driver's bid's for the field trips into T.O.M.

Driver bids for a field trip can be entered from the Detailed Field Trip screen (Figure B-19) if the Automatic Assignment Method is set to Bid in the Assignment tab of the District Options screen. This causes the Trip Bids button at the bottom of the screen to be visible. (See *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*.)

You can enter driver bids for this field trip *only* if this button is visible, which means the Automatic Assignment Method is set to Bid in the District Options. (See *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*.)

Figure B-19. Entering Driver Bids for a Field Trip Using the Trip Bids Button

To enter driver trip bids, click the Trip Bids button. The Bid Search screen is displayed (Figure B-20).

Note: This feature is meant to only be used by organizations that assign their drivers to field trips using the Bid Allowance method of automatic assignment.



A list of all current driver bids for this field trips.

BID SEARCH

Bid Search

Trip #: 10257Employee #:

Employee Last Name:

Employee	Bid#	Trip#	Points	Request	Status
ALLEN, ANITA	11	10257	100.00	2/23/00	BID
BARBANO, SHARON	13	10257	100.00	2/23/00	BID
MEYERS, MICHAEL	14	10257	50.00	2/23/00	BID
MOLINA, JUDY	15	10257	25.00	2/23/00	BID
NAPPE, BETTY	16	10257	25.00	2/23/00	BID

Find

New

Edit

Delete

Exit

Click to enter a new driver bid.

Figure B-20. The Bid Search Screen

See *Working with Field Trip Bids* in Chapter 7 – *Employees, Their Hours and Schedules* in the *T.O.M. Getting Started Manual* for additional details.