Chapter 3
Canceling Field Trips and Individual Drivers

Sometimes your customers will cancel their field trips after you have already assigned drivers to the field trips. Or, sometimes your customers will dramatically reduce the number of drivers required to service a field trip after you have already assigned drivers to a field trip. In either case you now have the further complication of having to remember that one or more drivers need to have a canceled field trip replaced.

NOTE: If your district has a policy of NOT replacing driver cancellations then you should make sure that the Replace Cancellations options is turned off in your District Options. You do not need to continue reading this chapter if your district does NOT replace driver cancellations. For more information see the *Chapter 4 – District Options* in the *T.O.M. Getting Started Manual*.

T.O.M. easily and accurately tracks either the cancellation of an entire field trip or just one assigned driver for a field trip. T.O.M. also automatically tracks those drivers who need replacement field trips. In this chapter you will learn:

- How T.O.M. Tracks Canceled Drivers Who Need A Replacement Trip.

- Canceling An Entire Field Trip

- Reducing The Number of Drivers Needed for A Field Trip After Drivers and Vehicles Have Been Assigned to the Field Trip.

How T.O.M. Tracks Canceled Drivers Who Need A Replacement Trip

A critical feature to driver automatic assignment is T.O.M.'s ability to first assign canceled drivers before assigning drivers from a rotation schedule. To do this T.O.M. must keep track of those drivers who were assigned to a field trip and then had that assignment canceled. The following is a detailed discussion of how T.O.M. keeps track of canceled drivers and how those drivers are later assigned replacing field trips:

1. Either an entire field trip is canceled or one or more drivers are canceled from a field trip that is already assigned drivers and vehicles. T.O.M. automatically enters the driver, the field trip number and the date of the field trip into the Canceled Driver List. This list contains all drivers that had field trip assignments that were later canceled. This list contains all cancellations, both replaced and non replaced assignments. See Figure 3-1 for an illustrated example of this process.
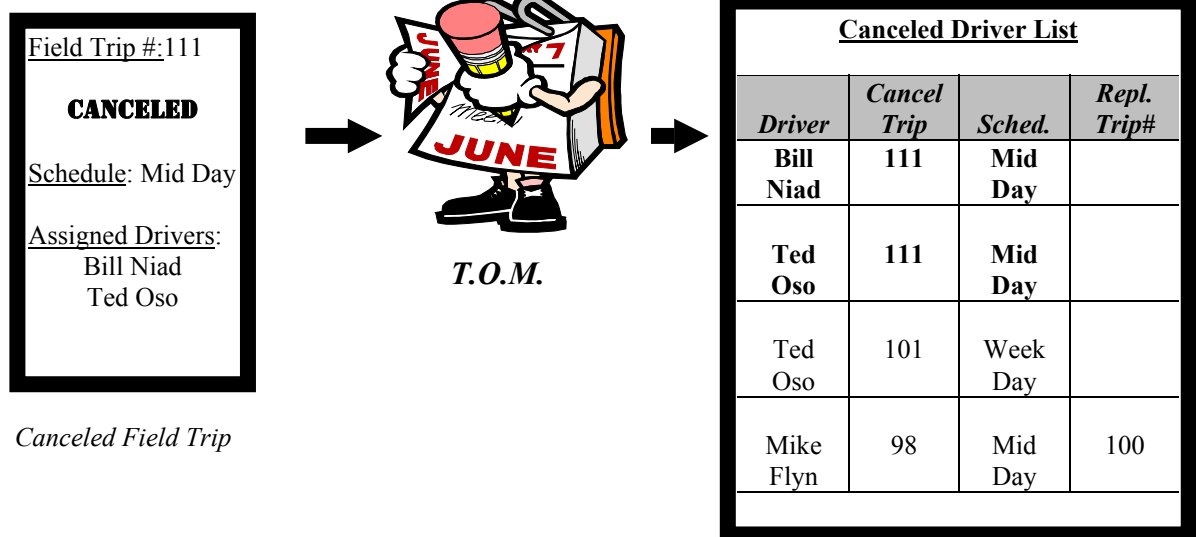

	Field Trip #:111
CANCELED	
Schedule: Mid Day	
Assigned Drivers: Bill Niad, Ted Oso	

Canceled Field Trip

T.O.M.

Canceled Driver List

Driver	Cancel Trip	Sched.	Repl. Trip#
Bill Niad	**111**	**Mid Day**	
Ted Oso	**111**	**Mid Day**	
Ted Oso	101	Week Day	
Mike Flyn	98	Mid Day	100

Figure 3-1. Example of T.O.M. Tracking Canceled Driver Assignments

2. Later when T.O.M. attempts to automatically assign drivers to a field trip before selecting drivers from the rotation schedule T.O.M. first inspects the Canceled Driver List to see if there are any canceled drivers who: 1. Have not had their canceled assignment replaced by another assignment. 2. Had an original assignment with the same schedule (for example Mid Day) as the new field trip that T.O.M. is attempting to automatically assign. If both of these conditions are true then T.O.M. will assign the canceled driver(s) first. Then if there are no more canceled drivers who meet the previous two conditions T.O.M. will turn to the rotation schedule. See Figure 3-2 for an illustrated example of this process.

Field Trip #112

Schedule: Mid Day

Drivers Required:

2

New Field Trip

T.O.M.

Selected Drivers that will be assigned to field trip #112

Canceled Driver List

Driver	Cancel Trip	Sched.	Repl. Trip#
Bill Niad	**111**	**Mid Day**	
Ted Oso	**111**	**Mid Day**	
Ted Oso	101	Week Day	
Mike Flyn	98	Mid Day	100
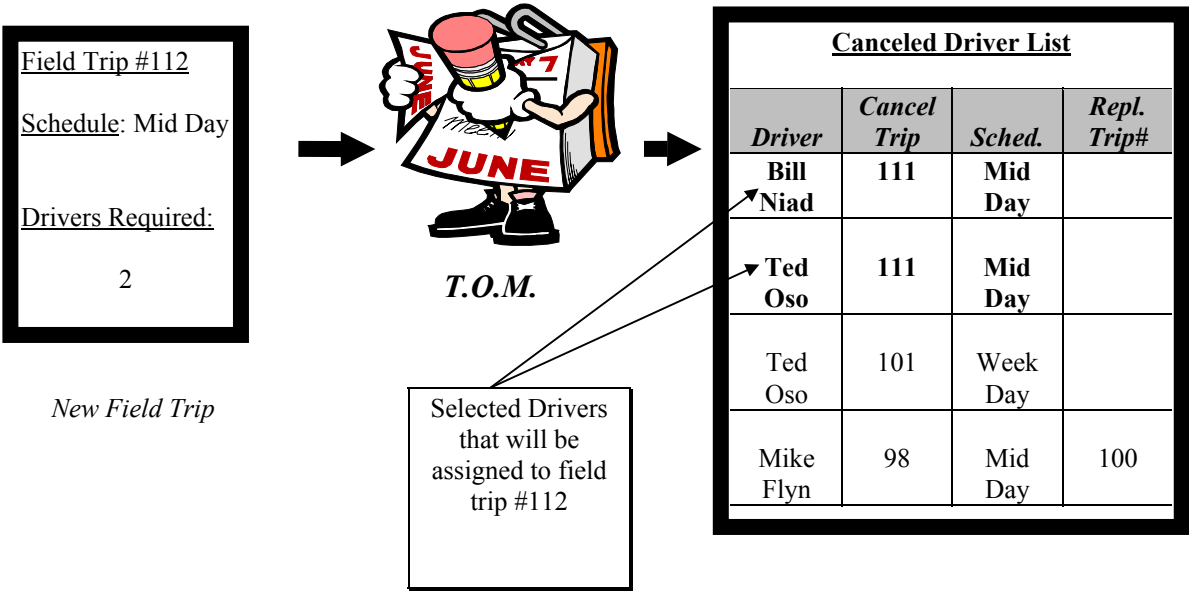
Figure 3-2. T.O.M. Checking Canceled Driver List First Possible Drivers to Assign to New Field Trip

3. T.O.M. then records the number of the new field trip as the replacement field trip number on the Canceled Driver record. This information is kept on record to allow your district to later report to the driver that in fact all of his / her canceled field trip assignments were replaced and which field trips replaced the canceled assignments. This information is also used by T.O.M. when printing the Trip Ticket for the driver for the new field trip assignment. T.O.M. will automatically print on the trip ticket that this field trip assignment is replacing a previous canceled field trip assignment. Figure 3. 3 gives an illustrated example of this process.

Field Trip #112

Schedule: Mid Day

Drivers Assigned:

Bill Niad
Ted Oso

New Field Trip

T.O.M.

Replacement Trip Recorded on Canceled List

Canceled Driver List

Driver	Cancel Trip	Sched.	Repl. Trip#
Bill Niad	111	Mid Day	112
Ted Oso	111	Mid Day	112
Ted Oso	101	Week Day	
Mike Flyn	98	Mid Day	100
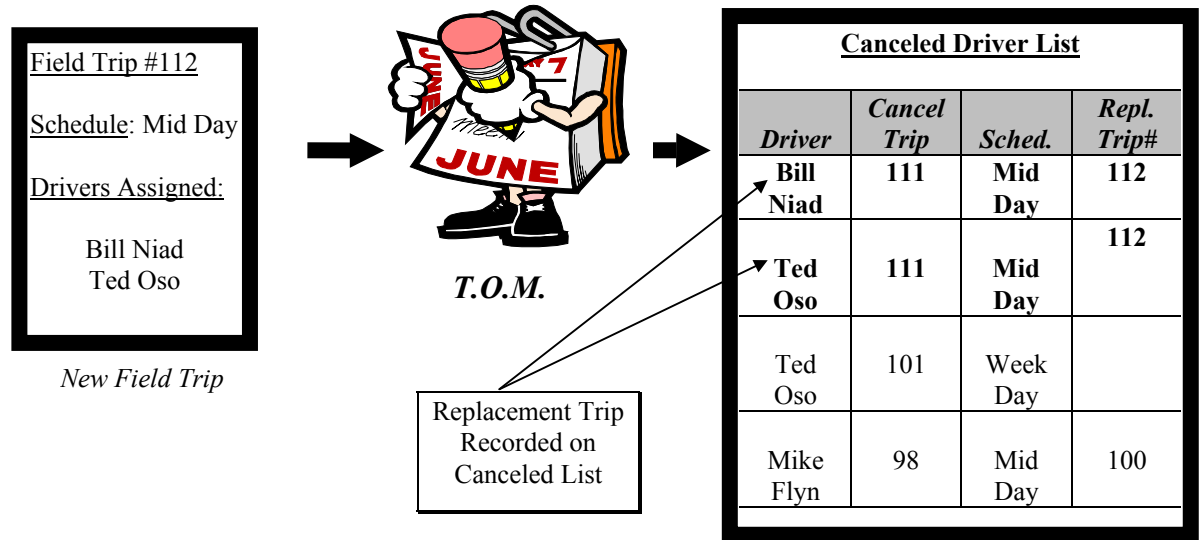
Figure 3. 3- T.O.M. Selects Two Canceled Drivers to Assign to New Field Trip and Logs the New Field Trip Number Into Canceled Driver List

Canceling An Entire Field Trip

It is easy to cancel a field trip using T.O.M. You click a button and T.O.M. automatically stamps the trip as canceled and logs the date that the field trip was canceled. If the field trip had drivers assigned to it T.O.M. automatically logs those drives into the Canceled Drivers List. The drivers on the Canceled Drivers List are given first priority when T.O.M. automatically assigns new field trips. The following is a detailed discussion on the steps involved in canceling a field trip using T.O.M.:

1. Retrieve the field trip you wish to assign by using the Field Trip Search / Selection screen (see Figure 1-2 in *Chapter 1 - Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* of this manual). Or you may enter a new field trip then press the Save button.

2. Click the Cancel Trip button (Figure 3-4). This will cause the field trip to be marked as canceled. If drivers were assigned to the field trip then T.O.M. automatically logs those drivers to the Canceled Driver List. The previous section of this chapter describes this process as well as how these drivers are given first priority when T.O.M. automatically assigns new field trips.

Click the Cancel Trip button to cancel the current field trip.

Figure 3-4. The Cancel Trip Button

2. T.O.M. will display a message screen asking you to confirm that the field trip is to be canceled (Figure 3-5). Once click the Yes button the field trip will be canceled. (Click No to return to the Detailed Field trip screen without canceling the field trip.)
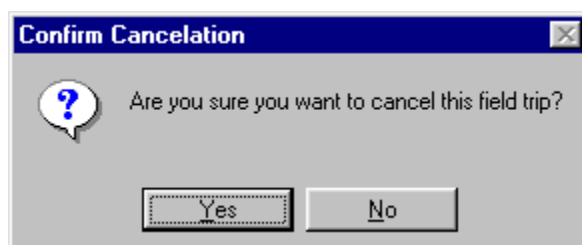

Figure 3-5. Message Screen Asking You to Confirm That You Wish to Cancel the Field Trip

3. After the field trip is canceled, the word 'Canceled' is displayed in red at the bottom of the screen when this field trip is displayed (Figure 3-6). The date that the field trip was canceled is also displayed. If you were to display the drivers assigned to the field trip you would see that their status had been changed to 'Canceled'. Finally, the Cancel Trip button is disabled to indicate that you may not click it again.

Field Trip *Stamped* as canceled with date of cancellation.

The Cancel Trip button is now disabled.
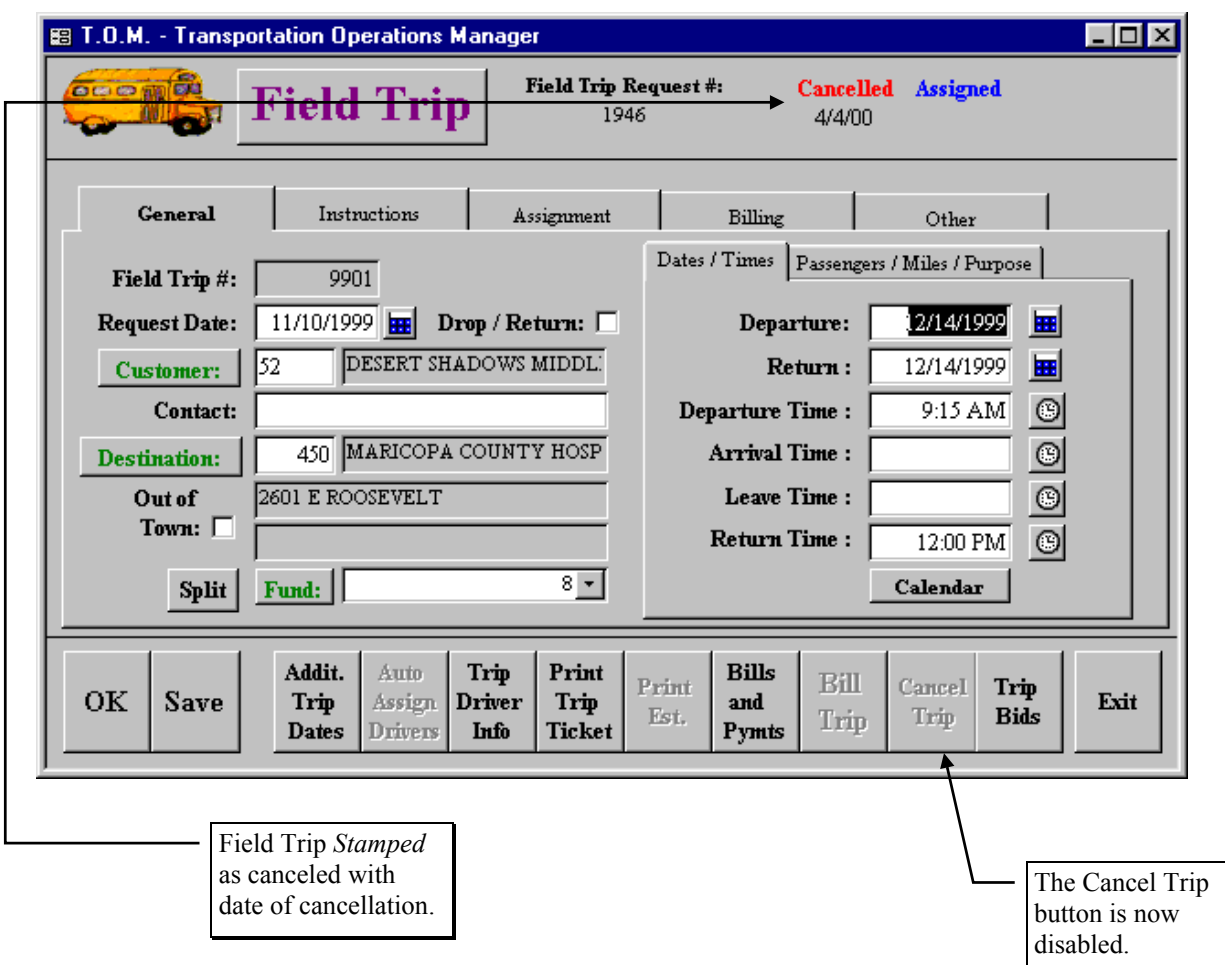
Figure 3-6. A Field Trip AFTER the Cancel Trip Button Was Clicked

Reducing the Number of Drivers Needed for a Field Trip After Drivers and Vehicles Have Been Assigned to the Field Trip by Canceling a Driver

Another way that a driver's field trip assignment may be canceled is to cancel an individual driver from a field trip rather than canceling the entire field trip. This feature is used when, for example, you have a field trip that has three drivers assigned to it and at the last minute you receive word that only two drivers will be needed for the trip. When this situation occurs you want to both remove one of the driver's assignments to the field trip as well as ensure that the driver whose assignment you removed is replaced for this canceled assignment with another field trip as soon as possible.

This process is called 'Canceling a Driver'. This is very easy to do with T.O.M. You simply display the drivers assigned to the field trip and change one of the driver's status from 'Assigned' to 'Cancel'. The following is a detailed discussion on the steps you take when canceling a driver from a field trip.

1. Retrieve the field trip you wish to assign by using the Field Trip Search / Selection screen (see Figure 1-2 in *Chapter 1 - Entering Field Trips, Printing Estimates and Using the Field Trip Inquiry* of this manual). Or you may enter a new field trip then press the Save button.

2. Click the Trip Driver Info button (Figure 3-7). This will cause the Trip Driver Information screen (Figure 3-8) to display.

Click the Trip Driver Info button to cancel an assigned driver.

Figure 3-7. The Trip Driver Info Button

Figure 3-8. Trip Driver Information Screen

3. You then change the selected driver's status from 'Assigned' to 'Cancel'. To change a driver's status on a field trip click the down arrow of the Status drop down list box (Figure 3-9). This list box displays the many types of status that you may assign to drivers of a field trip. Point to the word 'Cancel' and click it with your mouse. The system will automatically change the Status box from 'Assigned' to 'Cancel'.

Click on Cancel to automatically cancel the driver from this field trip.

Figure 3-9. Changing a Driver's Status From 'Assigned' to 'Cancel'

4. Click the Save button and then click the Exit button. You will automatically be returned to the main field trip screen (Figure 3-7). T.O.M. will automatically place the driver that you canceled to the Canceled Drivers List. See the first section of this chapter for a detailed discussion regarding the Canceled Driver List and how T.O.M. gives drivers on this list first priority when automatically assigning field trips.