## **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 Driver List				
CANCELED		Driver	Cancel Trip	Sched.	Repl. Trip#	
<u>Schedule</u> : Mid Day		Bill Niad	111	Mid Day		
<u>Assigned Drivers</u> : Bill Niad Ted Oso	Т.О.М.	Ted Oso	111	Mid Day		
		Ted Oso	101	Week Day		
Canceled Field Trip		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.



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.



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.
- 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.

📰 T.O.M Transp	ortation Operations Ma	anager			_ 🗆 ×
	Field Trip	Field Trip R	<b>equest #:</b> δ	Assigned	
General	Instructions	Assignment	Billing	Other	
Field Trip #: Request Date:	9901 11/10/1999 <b>EE Dro</b>	p / Return: 🗖	Dates / Limes Pass	engers / Miles / Purpose	
Customer:	52 DESERT SHAD	OWS MIDDL.	- Return Departure Time	12/14/1999 🔢	
Destination:	450 MARICOPA CO	OUNTY HOSP	Arrival Time		
Out of Town:	2601 E ROOSEVELT		Leave Time Return Time	: 12:00 PM	
Split	Fund:	8 -		Calendar	
OK Save	Addit. Anto T Trip Assign Di Dates Drivers I	Trip Print river Trip Info Ticket	Print Bills B Est. Pymts T	ill Cancel Trip rip Trip Bids	Exit
,	C cz	lick the Cancel	Trip button to nt field trip.		

Figure 3-4. The Cancel Trip Button



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.)

Confirm	Cancelation 🛛 🕅
?	Are you sure you want to cancel this field trip?
	Yes <u>N</u> o

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.

📰 T.O.M Transp	oortation Operations Manager	_ 🗆 >
	Field Trip Request #: Cancelled Assigned 4/4/00	
General	Instructions Assignment Billing Other	1
Field Trip #:	9901 Dates / Times Passengers / Miles / Purpose	·
Request Date:	11/10/1999 🗰 Drop / Return: 🗖 Departure: 2/14/1999	
Customer:	52 DESERT SHADOWS MIDDL: Return : 12/14/1999	
Contact:	Departure Time : 9:15 AM	
Destination:	2601 E ROOSEVELT	
Town:	Return Time :         12:00 PM	
Split	Fund: 8 - Calendar	
OK Save	Addit.AutoTripPrintPrintBillsBillCancelTripTripAssignDriverTripTripEst.BillsBillCancelTripDatesDriversInfoTicketFst.PymtsBillsCancelTrip	e Exit
Fi as da	eld Trip <i>Stamped</i> canceled with the of cancellation.	The Cancel button is no 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.

📰 T.O.M Transp	portation Operations Ma	anager					_ 🗆 X
	Field Trip	Field Trip 1	<b>Request #:</b> 43		Assigne	d	
General	Instructions	Assignment	Billing		Other	1	
Field Trip #:	9773		Dates / Times	Passengers	/ Miles / Pur	pose	
Request Date:	10/20/1999 👥 Dro	p / Return: 🗖	# of A	dults :	3	3	
Customer:	86 SANDPIPER E	LEM.	# of Stu	dents:	7.	7	
Contact:	Dorothy Guckert		# of Han	dicap:	(	0	
Destination:	324 PHOENIX ZO	0	Estimated	Time:	4.0		•
Out of	455 N. GALVIN PKWY		Estimated 1	Miles:	55.0	0	
Split	Fund:	9 -	Purpose :	3rd Gr. C	)vernight tr	ip	
OK Save	Addit.AutoTTripAssignDDatesDriversT	Frip Print river Trip Info Ticket	Print Est. Pymts	Bill Trip	Cancel Trip	Trip Bids	Exit
Click the Trip Dr button to cancel assigned driver.	river Info an <i>Figure</i>	3-7. The Trip	Driver Info But	ton			



T <mark>rip Driver</mark>	Informatio	on	9773	SANDPIF PHOENIX	YER ELEM. S 200	
eneral Notes Other						
Employee		Vehicle #	Miles	Hours	Status	
330 NEWTON	ASCHIS	150 -	0.0	0.00	Assigned	
<u>Odometer</u>	<u>Time</u>	01	Hours:	0.00	Calculate OT: 🔽	
Start:		Wa	it Time:	0.00		
Arrival:		OT Wa	it Time:	0.00		
Leave:		Hou	rs Paid:	0.00		
End:     Calc Miles     Calc Hours       Calc Miles     Calc Hours     Customer Miles:     0.00       Calc Wait Time:     Customer Hours:     0.00     Expense:     \$0.00						
Add Driver Manually ecord: 1	Add Driver Automatically		Log		Exit	

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'.



Trip Driver Information	Informatio	on	9773	SANDPIF PHOENIX	ER ELEM.
General Notes Other  Employee  330 NEWTON  Odometer  Start:  Arrival:  Leave:  End:  Calc Miles  Calc Wait Time:	ASCHIS Time © S Cu Cu Cu Cu	Vehicle # 150 • [ OT Wa OT Wa Hou istomer Miles:   stomer Hours:	Miles 0.0 Hours: it Time: it Time: rs Paid: 0.00	Hours 0.00 0.00 0.00 0.00 0.00 Expens	Status Assigned Cancel Passed Passed-Makeup Refused
Add Driver Manually	Add Driver Automatically	red)	ck on Ca	uncel to an	Exit

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.

