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PtMS for Windows Help: Group Trips

Group Trips

Group trips are a common scheduling problem for demand response paratransit transportation organizations. They are usually defined as a trip with a common destination such as a shopping center or nutrition site that have 10 or more clients being picked up at home and transported to the common destination in one vehicle.

Another common characteristic of group trips is a large percentage of clients typically do not go on these trips. For example, a shopping service may be scheduled for a group based on town or community of residence in a service area with 25 or more clients scheduled for this group and typically only half of the clients being transported on any specific day. Because of these high numbers of "cancellations" schedulers typically do not want to include these group trips as standing orders or routine trips in their PtMS scheduling table. They find these large rosters of group trips "clutter" their schedules for demand response scheduling.

The PtMS for Windows Group Trips feature allows schedulers to move these group trips to a special table where they can be easily setup, maintained and printed for drivers.

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Starting Group Trips

To access the Group Trip Services module

- 1. Select "Client Records and Scheduling" option on the PtMS menu
- 2. Click on the Options tab at the top
- 3. Click on Group Trips

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Adding a New Group Trip

Group Trips

Group Trips

Group Tripname
Granite Run Mall Shoppers

Pickup
(Use Client Address)

PGis X: PGis Y:

Destination
Granite Run Mall

DGis X: 1205220354 DGis Y: 1034748756

Take Times & Vehicle
Pickup: 08:00 Drop: 09:45 Vehicle: A01

Return Times & Vehicle
Pickup: 13:45 Drop: 15:30 Vehicle: A01

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode
	GEN	GEN	GEN	GEN

Reference Number: Text85:

Units: Over-ride Client X,Y Miles:
1 0 Σ

Group Trip Date: 10/05/2009 Group Trip Report:
 Selected Clients Only

Client ID	Client Name	PU Time	Ord	Ride Type	Post
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Select All Unselect All Sort By: Client Name

Goto Grp Trip:

Select and complete these fields to finish the group setup before adding clients

Click on the "Add Group" button to create a new group trip. Enter the name of the group trip in the dialogue box then click on OK to create the new group trip.

Group Trips

Group Trips

Group Tripname (New)

Pickup
(Use Client Address)

PGis X: PGis Y:

Destination

DGis X: DGis Y:

Take Times & Vehicle
Pickup: Drop: Vehicle: 999

Return Times & Vehicle
Pickup: Drop: Vehicle: 999

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode

Reference Number: Text85:

Units: Over-ride Client X,Y Miles:
1 0 Σ

Group Trip Date: 10/05/2009 Group Trip Report:
 Selected Clients Only

Client ID	Client Name	PU Time	Ord	Ride Type	Post
-----------	-------------	---------	-----	-----------	------

Select All Unselect All Sort By: Client Name

Goto Grp Trip:

New Group Trip

Please Enter New Group Trip Name

Granite Run Mall Shoppers

Click to Add Group then enter Group name and select OK

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Selecting Pickup Addresses and Destination:

Group Trips is set to default pickup address as the client's pickup address in the client record. However, you can create a group trip with an alternate pickup address by selecting the destination address lookup icon:




Click on this same icon next to the destination and select the destination for the group trip:


Group Trips

Group Trips

Group Tripname
Granite Run Mall Shoppers

Pickup
(Use Client Address) Use Client Address 

PGis X: PGis Y:

Destination 

Granite Run Mall
DGis X: 1205220354 DGis Y: 1034746756

Take Times & Vehicle
Pickup: Drop: Vehicle: 999

Return Times & Vehicle
Pickup: Drop: Vehicle: 999

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Reference Number: Text85:

Units: **Over-ride Client X,Y Miles:**

Group Trip Date: 10/05/2009 **Group Trip Report:** Selected Clients Only

Destination Lookup

Destination	Address
CROZER CHESTER MED CEN	TER, PA
CVS Pharmacy - Media	
Delaware County Community College	617 State Rte 252, MEDIA, PA
Delaware County Courthouse	101 W Front St., MEDIA, PA
Granite Run Mall	1067 West Baltimore Pike., MEDIA, PA
Healthplex Sports Club	194 West Sproul Rd., Springfield, PA
Lawrence Park Shopping Center	Lawrence Rd & Sproul Rd., BROOMALL, PA
Media Post Office	101 E Baltimore Ave., MEDIA, PA
MEDICAL ASSOCIATES	350 S CHESTER RD., SWARTHMORE, PA
Newtown Square Shopping Center	3590 West Chester Pike., NEWTOWN SQUARE, PA
PHYSICAL THERAPY CENTER	2400 SPROUL RD., BROOMALL, PA
RIDDLE MEMORIAL HOSPITAL	1068 W BALTIMORE PIKE., MEDIA, PA
SPRINGFIELD HOSPITAL	190 SPROUL RD., SPRINGFIELD, PA
Springfield Mall	1250 Baltimore Pike., Springfield, PA
Surgical Orthopedic Associates	2004 Sproul Rd # 100., BROOMALL, PA

Click on the browse and select button, click on the destination to select and fill in the destination field

Destination: **Address:**

Enter the beginning text in the Destination or Address boxes and then click the Apply Filter button to narrow down your destination choices. Click the Remove Filter button to show all destinations.

Click on either the Destination or Address headers to sort by that column.

Goto Grp Trip:

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Setup Times and Codes for the Group Trip:

Enter the Pickup and Drop-off times for the take and return trip. Also select the revenue codes for the trip. You can assign a reference number to the trip if needed. Finally, the number of units per trip can be adjusted from 1 upwards. This is useful if the group trip is setup with a "dummy" client record representing multiple clients for recording route statistics.

Group Trips

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Take Times & Vehicle
Pickup: 08:00 Drop: 09:45 Vehicle: A01

Return Times & Vehicle
Pickup: 13:45 Drop: 15:30 Vehicle: A01

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode
	GEN	GEN	GEN	GEN

Reference Number: Text#5:

Units: 0

Group Trip Date: 10/05/2009 **Group Trip Report:** Selected Clients Only

Select All Unselect All Sort By: Client Name

Goto Grp Trip:

Select and complete these fields to finish the group setup before adding clients

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Adding Clients to the Group Trip:

PtMS for Windows - Client Lookup

Client Lookup

Rec #	Last Name	First Name	DOB	Clt ID	City and State	Other ID	A1	A2	A3	A4	A5
3	ADAMS	JOHN		4	527 SANDY BANK RD., MEDIA, PA		MED				
11	GARFIELD	JAMES		29	274 REMINGTON RD., MARPLE,		MED				
12	GRANT	ULYSSES		30	431 SYCAMORE MILLS RD., MEDIA,		MED				
7	HOOVER	HERBERT		13	193 SANDY BANK RD., MEDIA, PA		MED				
4	JEFFERSON	THOMAS					MED				
10	JOHNSON	ANDREW			FIELD,		MED				
2	LINCOLN	ABRAHAM	10/11/4			123	MED				
9	MADISON	JAMES					MED				
6	POLK	JAMES			OWN SQUARE, PA		MED				
5	ROOSEVELT	THEODORE			MEDIA, PA		MED				
13	Route	Fixed		32	1067 Baltimore Pike., MEDIA, PA		GEN				
8	TRUMAN	HARRY		14	414 MEETINGHOUSE LN., MEDIA, PA		MED				
1	WASHINGTON	GEORGE		2	122 E JEFFERSON STREET, APT 5, MEDIA, PA		MED				

Last name starts with: First name starts with:

Select All Unselect All Sort By: Client Name

Goto Grp Trip:

Click on Add Clients button then click on a client to select and add to the group trip

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Pickup Order for a Group Trip

Group Trips can be sequenced by the scheduler or printed in alphabetic order and left to the driver for determining pickup order.

Group Trips

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Granite Run Mall

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Take Times & Vehicle
Pickup: 08:00 Drop: 09:45 Vehicle: A01

Return Times & Vehicle
Pickup: 13:45 Drop: 15:30 Vehicle: A01

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode
	GEN	GEN	GEN	GEN

Reference Number: Text85:

Units:

Over-ride Client X,Y Miles:

Group Trip Date: 10/05/2009 **Group Trip Report:** Selected Clients Only

Client ID	Client Name	PU Time	Ord	Ride Type	Post
4	ADAMS, JOHN			B	<input checked="" type="checkbox"/>
29	GARFIELD, JAMES			B	<input checked="" type="checkbox"/>
30	GRANT, ULYSSES			B	<input checked="" type="checkbox"/>
13	HOOVER, HERBERT			B	<input checked="" type="checkbox"/>
6	JEFFERSON, THOMAS			B	<input checked="" type="checkbox"/>
28	JOHNSON, ANDREW			B	<input checked="" type="checkbox"/>
3	LINCOLN, ABRAHAM			B	<input checked="" type="checkbox"/>
27	MADISON, JAMES			B	<input checked="" type="checkbox"/>
12	POLK, JAMES			B	<input checked="" type="checkbox"/>
11	ROOSEVELT, THEODORE			B	<input checked="" type="checkbox"/>
14	TRUMAN, HARRY			B	<input checked="" type="checkbox"/>
2	WASHINGTON, GEORGE			B	<input checked="" type="checkbox"/>

Select All Unselect All Sort By: Client Name

Goto Grp Trip:

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Printing a Group Trip Manifest for the Driver

Group Trips

Group Tripname
Granite Run Mall Shoppers

Pickup
(Use Client Address)

PGis X: PGis Y:

Destination
Granite Run Mall

DGis X: 1205220354 DGis Y: 1034746756

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode
	GEN	GEN	GEN	GEN

Reference Number: Text85:

Units:

Over-ride Client X,Y Miles:

Group Trip Date: 10/05/2009 **Group Trip Report:** Selected Clients Only

Client ID	Client Name	PU Time	Ord	Ride Type	Post
4	ADAMS, JOHN			B	<input checked="" type="checkbox"/>
29	GARFIELD, JAMES			B	<input checked="" type="checkbox"/>
30	GRANT, ULYSSES			B	<input checked="" type="checkbox"/>
13	HOOVER, HERBERT			B	<input checked="" type="checkbox"/>
6	JEFFERSON, THOMAS			B	<input checked="" type="checkbox"/>
28	JOHNSON, ANDREW			B	<input checked="" type="checkbox"/>
3	LINCOLN, ABRAHAM			B	<input checked="" type="checkbox"/>
27	MADISON, JAMES			B	<input checked="" type="checkbox"/>
12	POLK, JAMES			B	<input checked="" type="checkbox"/>
11	ROOSEVELT, THEODORE			B	<input checked="" type="checkbox"/>
14	TRUMAN, HARRY			B	<input checked="" type="checkbox"/>
2	WASHINGTON, GEORGE			B	<input checked="" type="checkbox"/>

Select All Unselect All Sort By: Client Name

Goto Grp Trip:

RepGroupTrip

Granite Run Mall Shoppers going to: Granite Run Mall, 1067 West Baltimore Pike, MEDIA, PA, 19063

Date: Monday, 10/05/09 Take: Veh A01, Pickup @ 08:00, Drop @ 09:45 / Return: Veh A01, Pickup @ 13:45, Drop @ 13:45

Travel time to first stop: Arrival time at first stop: Return arrival time at dest: Return departure from dest:

If last assignment: Fueling time _____ Arrival time @ Yard _____

Client ID	Client Name	Pickup Location Address	Phone	Take			Return		
				Rate	Mileage	Time	Rate	Mileage	Time
4	ADAMS, JOHN	527 SANDYBANK RD MEDIA, 19063	(555)655-5555						
29	GARFIELD, JAMES	274 REMINGTON RD MAPLE, 19008							
30	GRANT, ULYSSES	431 SYCAMORE MILLS RD MEDIA, 19063							
13	HOOVER, HERBERT	193 SANDYBANK RD MEDIA, 19063	(610)655-9999						
6	JEFFERSON, THOMAS	88 E 5TH ST MEDIA, 19063	(610)655-2221						
28	JOHNSON, ANDREW	95 SHELBURNE RD SPRINGFIELD, 19064							
3	LINCOLN, ABRAHAM	1110 WOODED WAY MEDIA, 19063	(555)655-5555						
27	MADISON, JAMES	2244 E DEERFIELD DR MEDIA, 19063							
12	POLK, JAMES	212 Bishop Hollow Rd NEWTOWN SQUARE, 19073	(610)655-3322						
11	ROOSEVELT, THEODORE	1351 MARTINGALE RD APT 2, MEDIA, 19063							
14	TRUMAN, HARRY	414 MEETINGHOUSE LN MEDIA, 19063	(610)655-8888						
2	WASHINGTON, GEORGE	122 E JEFFERSON STREET APT 5, MEDIA, 19063							

Driver Signature: _____

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Posting Group Trips to the Trip Transactions Table for Reporting

Select the Group Trip Date (the date the transportation service was delivered) and click on the Post button to post the group trip into the trip transaction table. This will create a separate take and return trip for each client selected in the group trip.

Group Trips

Group Trips

Group Tripname
Granite Run Mall Shoppers

Pickup

(Use Client Address)

PGis X: PGis Y:

Destination
Granite Run Mall

DGis X: 1205220354 DGis Y: 1034748756

Take Times & Vehicle
Pickup: 08:00 Drop: 09:45 Vehicle: A01

Return Times & Vehicle
Pickup: 13:45 Drop: 15:30 Vehicle: A01

Revenue Codes:

Revenue ID	Agency	Funding	Purpose	Tripcode
	GEN	GEN	GEN	GEN

Reference Number:

Units:

Group Trip Date: 10/05/2009 **Group Trip Report:** Selected Clients Only

Client ID	Client Name	PU Time	Ord	Ride Type	Post
4	ADAMS, JOHN			B	<input checked="" type="checkbox"/>
29	GARFIELD, JAMES			B	<input checked="" type="checkbox"/>
30	GRANT, ULYSSES			B	<input checked="" type="checkbox"/>
13	HOOVER, HERBERT			B	<input checked="" type="checkbox"/>
6	JEFFERSON, THOMAS			B	<input checked="" type="checkbox"/>
28	JOHNSON, ANDREW			B	<input checked="" type="checkbox"/>
3	LINCOLN, ABRAHAM			B	<input checked="" type="checkbox"/>
27	MADISON, JAMES			B	<input checked="" type="checkbox"/>
12	POLK, JAMES			B	<input checked="" type="checkbox"/>
11	ROOSEVELT, THEODORE			B	<input checked="" type="checkbox"/>
14	TRUMAN, HARRY			B	<input checked="" type="checkbox"/>
2	WASHINGTON, GEORGE			B	<input checked="" type="checkbox"/>

Select the Group Trip Date then click on Post to post the trips into the trip transaction table for reporting

Select All Unselect All Sort By: Client Name

Close Goto Grp Trip: Add Clt **Post** Add Grp Save Grp Delete Grp

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