# **Compass** Route Builder





## User Guide

## **COMPASS ROUTE BUILDER USER GUIDE**

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## **GET TO KNOW COMPASS**

#### Introduction

Compass is a web-based solution for school transportation management that completely integrates routing, student tracking, and vehicle tracking and surveillance. Since Compass is truly web-based, users don't need to install any specific software or maintain their own servers for full functionality.

#### What does Compass do?

By simply logging in, users can start planning routes or tracking vehicles and students from their own web browser. Compass is a powerful routing software that features easy 2-step route building and automatic optimization.

Schools can easily synchronize student information systems to Compass. One Database holds student information offering users the best experience.

Users can monitor video surveillance in real time or learn about the vehicle data status. DVR health-check, panic alarms or even stop-arm deployment can be detected from any device that has access to the Internet.

Compass is based on ESRI Geographic Information Systems (GIS) for mapping and planning, and users have the ability to modify ESRIbased maps to suit their needs. Users don't need to import GPS data in order to see live vehicle tracks in a map or check the occupants of the vehicle at any time. By clicking a button, all this information is immediately available.

## Get Familiar with Compass Terminology

It is important for customers to familiarize themselves with several concepts that are crucial to achieve a good understanding of how Compass works before they are able to take advantage of its capabilities.

#### **Scenarios**

Loading a scenario is the very first step for a user who has already logged in to the Compass Route Builder website. A **Scenario** is a version of the conditions that affect the routing events and it is determined by a complete set of data.

In other words, customers can create scenarios based on their needs and different scenarios will contain different data. For example, some customers might need to have different scenarios for different seasons throughout the school year. Since Compass Scenarios are associated to school districts, related data has to be available before a Scenario can be created.

**Safe Fleet** will initially provide its customers with one scenario but having this cloned before doing any work is recommended. This will allow the user to have two sets of the original data as a safety measure.

#### Maps

ESRI-based **Maps** are fundamental for customers to develop routes in Compass as they present valuable graphic information. However, it is important to understand that these maps are ineffective without data. It is necessary to build the dataset before using any of the map-related features and such dataset will be linked to the map once the user loads an existing scenario.

When data is available, the user may get information from those features displayed on the Map by clicking on them.

#### Runs

**A Run** is a set of directions used by a driver to drive the bus off a depot, pick up students at assigned stops, drop those students off at the selected place (generally a school) and then drive back to the depot or proceed to complete another Run. Of course, a different Run for the same driver could follow the inverse path, leaving the depot to pick up students at school, dropping them off at assigned stops (normally their residences) and then driving back the bus to the depot. Notice that for every Run, either pick up or drop off will generally be at the school.

#### Stops, Schools and Students

In order to plan Runs, users need to create **Stops** first, which will determine the course of the Run. Stops are those places where students are going to be picked up or dropped off by a bus every day, so they also require two more sets of data to have a real meaning, **Schools** and **Students**, which are linked to specific addresses. Such data has to be loaded into the database before the user starts working on the actual routing.

Furthermore, Stops always need to include pick up and drop off information to be created (i.e. when students get on the bus and when they finally get off).

It is also important to know that Compass allows the creation of two different types of Stops, depending on where these Stops are located relative to the students' residencies. **Curb-to-Curb Stops** are situated by the students' residencies and **Group Stops** may be planned to be at any place near the residencies of several students who will be able to walk to such Stops from home.

#### Routes

We can describe **Routes** as Runs grouped together within a single programmed itinerary. A bus driver might need to do two or more Runs with different purposes before finally returning the bus to the depot. For example, there might be two groups of students going to school at different times in the morning, or one group might be taken to school and the other to a different location. The resulting combination of Runs is what we call a Route in Compass.

#### Vehicles

Compass uses the term **Vehicles** to refer to all the vehicles available for customers' route planning. Since vehicles are held in Depots, the location of these are an essential piece of information from the very beginning of any project.

Obviously, the size of any selected vehicle needs to be in accordance with the number of riders, but also options of equipment and aids must be taken into consideration when including vehicles in a run. Some examples are wheel chair adaptation, seat belts or safety vests availability.

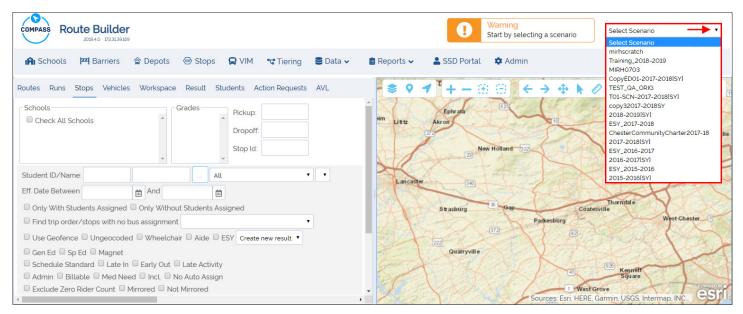
## **UNDERSTANDING SCENARIOS**

A Scenario is a version of all the circumstances that affect the routing events and it is determined by a specific set of data.

Some Compass customers might need separate route plans for different seasons throughout the school year, and having various Scenarios allows users to edit them independently without affecting each other's data. Since Compass Scenarios are associated to school districts, related data have to be available before a Scenario can be created. These data can include addresses, bell times, programs, student enrollment, etc.

**Safe Fleet** initially provides customers with one Scenario with the required data for implementation but having this cloned before doing any work is recommended. This procedure will allow the user to keep two sets of the original data for safety reasons.

Once **logged in** to Compass Route Builder, users need to open an existing scenario or create a new one within the Scenarios window. To display the Scenarios drop-down menu click **Select Scenarios** tab on the upper-right corner of the screen.



When you access Compass for the first time, a warning message informs you that selecting a Scenario is necessary before any routing tasks can be performed. This is displayed on the top-right section of the main screen next to the Scenarios drop-down menu (see previous image).

Once you select a Scenario, the warning message is replaced for a new dialog indicating that the Scenario is being loaded.



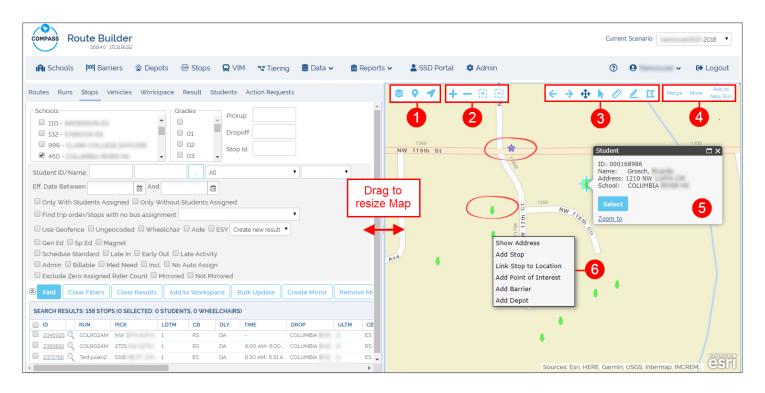
The Administration module holds the Scenarios tool, which allows users to edit existing Scenarios or create new ones. This module can be accessed by clicking **Admin** in the main toolbar. Visit the **Administration** section of this guide to learn more.

| COMPASS RO | 2019.4.0 172.31.39.16 |          |       |       |           |          |             |              | ¥       | Current Scenario | 2017 | -2018[SY]  | ¥        |
|------------|-----------------------|----------|-------|-------|-----------|----------|-------------|--------------|---------|------------------|------|------------|----------|
| 😭 Schools  | PP Barriers           | 🎓 Depots | Stops | 😭 VIM | 📽 Tiering | 🛢 Data 🗸 | 🗎 Reports 🗸 | 💄 SSD Portal | 🌣 Admin |                  | ?    | ⊖ Philly ∨ | 🕞 Logout |

#### WORKING WITH THE MAP

One of the most important tools for Compass users is the Map. This is located on the right side of the main screen and can be manually expanded or reduced with the draggable separator (see image below).

Safe Fleet uses ESRI maps and Geographic Information System (GIS) software to offer the best experience.



There are many elements that can be seen within the Map's frame.

The toolbar is always visible in the Map and it is divided in 4 different sections, each one holding different tools:

- 1. The first section holds Layers, Address or Street Finder and Location.
- 2. The second section holds Zoom In and Out and Marquee Zoom In and Out.
- 3. The third section holds Back View (previous) and Next View, and Select, Measurement, Length and Polygon tools.
- 4. The fourth section includes tools to Merge, Move or Add Stops to a New Run.

Other elements can be displayed as different icons during the routing process. The image above shows Students (green figures) and Stops (purple stars) as examples.

- 5. Clicking on any of the icons will disclose a window that shows the information related to that element and available optional tasks.
- 6. Right-clicking anywhere on the Map will open a window with other additional tasks. These are: Show Address, Add Stop, Link Stop to Location, Add Point of Interest, Add Barrier and Add Depot.

The first group of tools allows selecting layers, finding addresses and getting directions on the Map.

Clicking the **Layers** button displays the Layers menu from which you can select or deselect Layers to be included in the Map as preferred.

You will notice that some elements in this menu, such as Attendance or Hazard Zones, are drop-down menus themselves. You can expand these to see the available options.

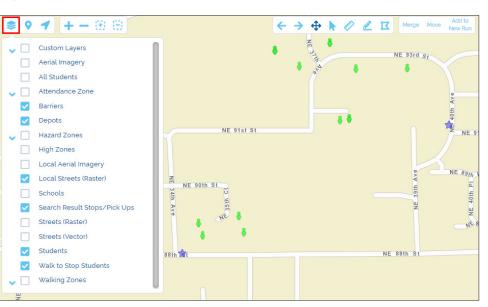
Clicking the **Address** button displays an **Address/Street Finder** tool. When a specific address is entered and the Search button clicked, a table displays matching Streets and their number ranges.

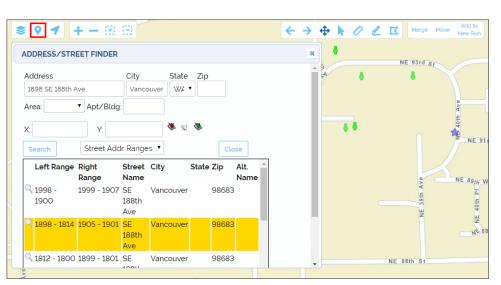
A magnifier button allows you to locate the selected entry in the Map.

Geocoding tools are also available to disclose addresses and coordinates on the Map. See the Geocoding section to learn more about these tools.

Clicking the **Directions** button pops up a window that allows the input of the initial and final addresses of a route of interest.

After clicking **Get Directions** below, the system resolves the route and displays the directions (see next section).





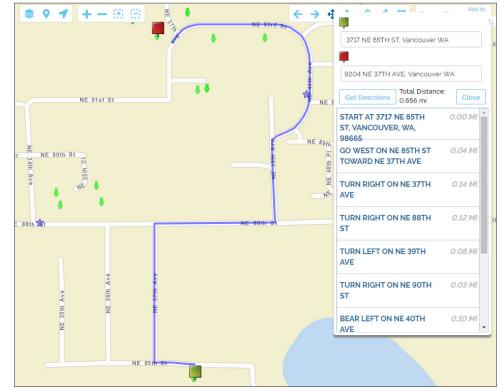


The resulting path is disclosed on the Map as a colored line.

Initial and final points are also displayed.

On the right of the Map, detailed directions are listed, including partial distances from one point to the next.

The Total Distance is shown on top of the Directions.



The second set of tools offers two ways of zooming in and out. The **Zoom** tool directly zooms in/out the complete Map after clicking the +/- buttons respectively. The **Marquee Zoom** allows the selection of a particular area in the Map. Let's see how this works:

After clicking that Marquee Zoom in or out, drag the mouse cursor over the Map while a red polygon displays to help you delimit the area of interest.

Once finished, release the mouse and the Zoom in/out will operate accordingly.

As a result, the selected area will occupy the whole Map.



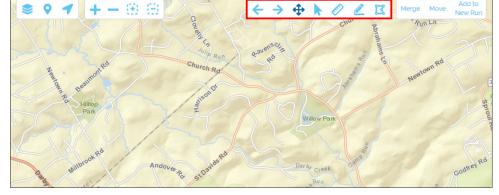
A third set of tools allows users to move, take measurements and draw polygons:

Use the **Back** and **Next** arrows **to** display the previous or next view in the Map.

With the **Drag** tool, move the Map to position this on the screen as preferred by dragging it with the mouse cursor.

Use the **Select** tool to select features displayed on the Map.

Use the **Measure** tool to make area and distance measurements, or disclose coordinates (latitude and longitude).



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Measurement

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Hectares

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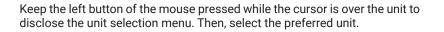
Acres

Sq Miles

Sq Yards Sq Feet Sq Meters

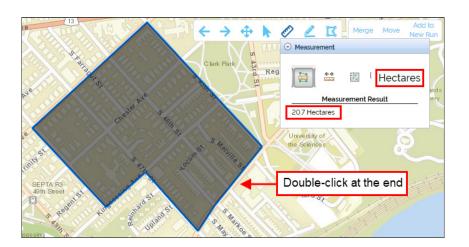
Sq Kilometers Hectares

When you click the corresponding icons to select the tool, the current unit for that tool is displayed.



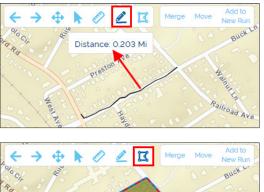
When measuring areas, hover the mouse over the map and click on each necessary point to delimit the polygon of interest. Then double-click to end the selection. The resulting measurement will be disclosed at the bottom of the window.

For distances, click on the selected points to draw a sequence of segments that constitute the route to be measured. Double click on the last point to end the measurement. The result will be disclosed at the bottom of the window.



Use the **Length** tool to draw a line on the Map and automatically measure the distance it represents.

Use the **Polygon** tool to draw an area on the Map. Once you have selected the right number of corners, double click on the last one to end delimiting the area.





The fourth set of tools allows users to combine, move or add Stops to a new Run:



Use the Stop Adding to Map tool to generate a New Run while selecting School, Depot, Vehicles and the preferred Stops on the Map:

| f⊞         | New R  | Route to school   | ×  | $\times  \overset{*}{\circledast} \circ \not \neg \not + - \oplus \oplus \bigcirc \bigcirc$  |
|------------|--|---|--|---|
| A          | Depot     Vehicles       ALL CITY     II     2B108     II       Address: 6830 NORWITCH DRIVE     Vehicle: 2B108     AVL: NA       City:     State:     Zip:       Vehicle: 700     N/A       Go to map     Max Riders: 34     Seat Beit: 0 |   | 2B108 • 11<br>Vehicle: 2B108 AVL: N/A<br>Vehicle Type: N/A |   |
| St:<br>Std | <b>art depo</b><br>ops<br>Id stops t   | v<br>t: ALL CITY End depot: ALL CITY<br>using map. Change order using drag and drop<br>31958 Bus stop 53RD ST / CHESTER AVE |  | Landome Barry Vadon   |
|            | ■ 3031960 Bus stop EDGEWOOD ST / SPRINGFIELD AVE   |   |  | au Basterior and Songer Aver San Cas Works Songler Aver   |
|            | ■ 303  | 31961 Bus stop 55TH ST / PENTRIDGE ST   |  | The second |
|            | E Schools group  |   |  | provident of and Main St. F. B. S. Dassander Mongo  |
|            | =  | 3031958 School  | ACACELITY  |   |
|            | ■ 3031960 School   |   |  | Sharon Hill   |
|            | =  | 3031961 School  | ACADEMY  | and and a set   |

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## **MANAGING SCHOOLS**

#### **Understanding School Management**

The **Schools Management** tool is accessible by clicking on the Schools tab in the upper left section of the screen. It holds three different kinds of information under separate tabs (School Details, Bell Information and School Programs).

| COMPASS Route Builder<br>2019.40 172.31.39.169  | SCHOOLS MANAGEMENT  |  | *         |
|---|---|--|-----------|
| R Schools   | Print   Update Calendars      SCHOOLS (774)   | School Details Bell Info Programs School Calendar Valid User Specialized   | Logout    |
| Routes     Runs     Stops     Vehicles       Schools     Check All Schools     0000 - 0-EXCEPTIONS       5901 - 63RD ST. MULTICULTU<br>ACADEMY     Student ID/Name:       Student ID/Name:     Eff. Date Between       Only With Students Assigned     I       Find thip order/stops with no bu     Use Geofence       Use Geofence     Ungeocoded       Gen Ed     Sp Ed       Magnet     Schedule Standard       Etxclude Zero Rider Count     M       B     Find     Clear Filters       SEARCH RESULTS: O STOPS to SELEC     ID     RUN | CODE         SCHOOL           Q         III         IIII           Q         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | Name: Code:   Type Level:   Last Update: Image: Code:   Address City   Address City   X: Y:   X: Y:   Image: Code: Image: Code:   Address City   Address City   X: Y:   Image: Code: Image: Code:   X: Y:   Image: Code: Image: Code:   Address Image: Code:   Address City   Save As New School Update Existing School Details   Delete School City | New Run   |
| 4   |   | Sources: Esri, HERE, Garmin, USGS, Intermap  | INC. COST |

When users display the Schools Management window, a list of the Schools included in the database also becomes visible on the left. You will find two icons located right before each School name in the list that have different functionalities:

• You can click on the **magnifier icon** to display the **location window** of a specific school on the map. This shows the address and the associated geographic coordinates.

| SCHOOLS MANAGEMENT       |  | × ← → ↔ ト ⊘ ℓ I Merge Move New Run   |
|--------------------------|--|--|
| Print   Update Calendars | School Details Bell Info Programs School Calendar Valid User Specialized | Weinew SP  |
| SCHOOLS (774)            | School   | 122 Caller ave   |
| CODE SCHOOL              | Name: Code:  | Constanting of the state of the |
| □ Q 2 0000 · ·           | Type   | Stran Threads and States of the Ra   |
| C 2 5996                 | Last Update:   | Ardmore 2  |
| 0596                     | Address  | School C ×   |
|                          |  | School:<br>School Code: 3901<br>Rithe Address: WASHINGTON LANE   |
| 🗆 🔍 📸 1901               | Address City State Zip   | Greek  |
|                          |  | Red Middletown Re X: 886761<br>Y: 74454  |
|                          | X: Y: 🕉 🔍 🕷  | suite Ro   |
| 🗆 🔍 📷 3379               | Additional Information   | Gienolden Lundul   |
|                          | Emergency  | Folsom   |
|                          |  | Brookhaven Woodlyn Brookhaven  |
| 4925                     |  | Man Annehester Re Chester  |
|                          |  | Hamana Creater Handa   |
| A 200                    |  | smans.Rd and A. A and A  |

- You can click on the record icon to access the available School's information in the School Management window.
- School contact and general information is displayed under the School Details tab.
- Next to School Details, you will find another tab under which Bell Information is available.
   To learn about this, read the tutorial <u>Defining Bell Times</u>.

| SCHOOLS MANAGEMENT       |  | × ← → ↔ ► ⊘ ∠ IZ ■ Merge Move Add to New Run |
|--------------------------|--|--|
| Print   Update Calendars | School Details Bell Info Programs Eligibility Rules School Calendar Valid User Specialized | Historgal Park Prussia                       |
| SCHOOLS (780)            | School   | Sportene E. on Participation /2              |
| CODE SCHOOL              | Name: Code: 3901   | 23 Can Can Can Can                           |
| □ Q 🚰 0000<br>□ Q 🚰 5901 | Type Public • Level: Other •   | Beneral Conception of Billing at an a find   |
| C 📑 5996                 | Last Update:   | Stran Branchage Strange Strange Strange      |
| 0596<br>0 0 m 3901       | Address  | Ardmore 23                                   |
| 2620                     | Address City State Zip   | Goshan Rd Broomall Broomall Broomall         |
| Q 🚰 3990                 | WASHINGTON LANE PA • 46  | **Chesterpike Haverlord                      |
| Q 3498                   | X: 62888 Y: 83744 😻 🔍 😻  | Reley<br>Greek<br>Middletown, Stato Park 252 |
| 🗆 🔍 🚰 3379               |  | Springfield                                  |
| □ Q 2 5200<br>□ Q 2 6902 |  | No. Po                                       |
| Q 3903                   | Emergency 👻  | Gienolden Under                              |
| 🗆 🔍 🚰 4925               | J  | Folsom                                       |
| 963                      |  | Brookhaven Woodlyn Brookhaven                |
| □ Q m 4440<br>□ Q m 8200 |  | Roeing Inf I Airport                         |
| 🗆 🔾 🚰 3374               |  | Mann 322 P. Chester                          |

#### Adding New Schools

You can add new Schools in the database with the Schools Management tool. First, click the **School Details** tab located in the upper left section of the screen. The School Details screen displays.

To add a **School** record:

|                        |                       |   | ×     |
|------------------------|-----------------------|---|-------|
| chool Details Bell Inf | o Programs Eligibilit | ty Rules School Calendar Valid User Specialized | _     |
| School                 |                       |   |       |
| Name:                  |                       | Code:   |       |
| Туре                   | •                     | Level:  | -1    |
| Last Update:           |                       | Σ.  |       |
| Address                |                       |   |       |
| Address                | City                  | State Zip                                       |       |
|                        |                       |   | -2    |
| X:                     | Y:                    | ۵ 🖉 🖉   |       |
| Additional Inform      | nation                |   |       |
| Emergency              |                       |   |       |
|                        |                       |   |       |
|                        |                       | 4 3   |       |
|                        |                       |   |       |
|                        |                       |   |       |
|                        |                       |   |       |
|                        | 5                     |   |       |
| Si                     | ave As New School     | Update Existing School Details Delete School    | Close |

- 1. Within the **School** area, enter **Name** and **Code**, select **Type** (APS, Charter, Non Public or Public) and **Level** (Elementary, Middle, High or Other).
- 2. Within the **Address** area, enter the necessary information in the corresponding text boxes.

Use the **Coordinates Tool** to disclose School's Coordinates (Geocoding).

To learn more about this tool read <u>Geocoding</u> here.

- 3. In the Additional Information area, enter other specific information in the provided text boxes, including minimum and maximum walk distance to School and Stops as well as minimum and maximum distance between the School and the Stops.
- 4. Enter Student's Emergency Contact Name and phone number.

For a clearer view of what's involved in steps 3 and 4, see the corresponding image in the next section Editing Existing Schools.

5. Click on Save As New School to save the School Details.

## Editing Existing Schools

You can edit Schools existing in the database with the Schools Management tool. Once in the **School Details** screen, find and click the record icon on the left of the School that you want to edit. The School Details screen displays the information assigned to that School.

#### To edit the **School** record:

| SCHOOLS MANAGEMENT   | x   |
|--|---|
| 🖨 Print   Update Calendars   | School Details Bell Info Programs Eligibility Rules School Calendar Valid User Specialized  |
| SCHOOLS (780)  | School  |
| SCHOOLS (780)       CODE         CODE       SCHOOL         SCHOOL       SCHOOL         SCHOOL       SCHOOL         SCHOOL       SCHOOL         SCHOOL       SCHOOL         SCHOOL       SCHOOL | Name: ACADEMY   Type Non Public   Last Update: 07/16/2018 014755 pr   Address   Address   Address   MARKET STREET   PA   9   X:   07664   Y:   22 |
| □ Q 3 4440<br>□ Q 3 8200   | 4 3   |
| 3374   |   |
| 🗆 🔍 🚰 3315   |   |
| 🗆 🔍 🚰 5430   |   |
| 🗆 🔍 🚰 6480   | 5   |
| 🗆 Q 💏 3905 🔻   |   |
|  | Save As New School         Update Existing School Details         Delete School         Close   |

 Within the School area, edit Name, Code, Type (APS, Charter, Non Public or Public) Level (Elementary, Middle, High or Other).

> The **Last Update** field lets you see when the file was updated. To view a complete School Changes Report, click the hourglass button on the right.

2. Within the **Address** area, enter the necessary information in the corresponding text boxes.

Use the **Coordinates Tool** to disclose School's Coordinates (Geocoding).

To learn more about this tool read <u>Geocoding</u> here.

| Additional Informat             | ion                                 |                                 | ≈       |
|---------------------------------|-------------------------------------|---------------------------------|---------|
| Phone:                          |                                     | WAN:                            |         |
| Principal:                      |                                     | Asst. Prin/Dean:                |         |
| Office Mgr./Admin:              |                                     | FAX:                            |         |
| Walk to School<br>(mi.):        | 150                                 | Walk to Stop (mi.):             | 2       |
| All stops for this scho         | ol will be within th                | ne following range:             |         |
| Minimum distance to stop (mi.): |                                     | Maximum distance to stop (mi.): | 0       |
| Network                         | •                                   | Asst. Superintendent:           | •       |
| Analyst                         | Morris, Joseph<br>xsis0907, xsis090 | 07                              | *<br>•  |
| Hazard                          |                                     |                                 |         |
|                                 |                                     |                                 | 1       |
|                                 | Hazard file Selec                   | ct file (pdf, doc, x. 1         | dd File |
| Emergency                       |                                     |                                 | *       |
| Contact Name                    |                                     | Phone Number                    |         |

3. Click the double arrow to the right of the **Additional Information** tab to extend the dialog and enter other specific information in the provided text boxes, including minimum and maximum walk distance to School and Stops as well as minimum and maximum distance between the School and the Stops.

If a Hazard Zone has been established, the end of this dialog allows you to type related notes in the **Hazard** text box and upload the file by clicking the **Hazard File** browser to locate it in your computer, selecting it and clicking the **Add File** button.

- 4. Click the double arrow to the right of the **Emergency**, tab to display the dialog and enter Student's Emergency **Contact Name** and **Phone Number**.
- 5. Click on Update Existing School Details.

| Print   Update Calendars   | School Details Bell Info Programs Eligibility Rules School Calendar Valid User Specialized  |
|--|---|
| SCHOOLS (781)  | SPED GENED MAG SPECIAL SPED PROG  |
| CODE SCHOOL  | Description \$  |
| 0     2     2     3     0001       1     2     2     0000       1     2     2     5996       1     2     2     5996       1     2     2     3901       1     2     2     3900       1     2     2     3990       1     2     2     3498  | Bell Time:      :       Auto fill time windows       To/From \$         Arrive After:      :       Arrive By:      :         Leave After:      :       Leave By:      :         Add       Update       Remove |
| 3379   | BELL TIMES  |
| 0         image: bit with the second sec | TYPE DESCRIPTION TIME ARRIVE AF ARRIVE BY LEAVE AFT LEAVE BY  |
| 3315   | Schedule:   |

 Proceed to the Bell Information section by clicking on the Bell Info tab and edit Type of Education or Bell Information, including AM/PM Description, Bell Time and Time Windows, if needed.

> Read the section <u>Defining Bell</u> <u>Times</u> to learn more about Bell Information.

 Finally, save by clicking on the Update Existing School Details tab.

## **Deleting Existing Schools**

| You can always delete an existing School record from the database with the School Management toc |               |
|--|---------------|
|  | 01. 10 00 30. |

| Print   Update Calendars                    | School Details Bell Info Programs Eligibility R   | Rules School Calendar | Valid User Specialized |
|---|---|-----------------------|------------------------|
| SCHOOLS (780)                               | School  |                       |                        |
|   | Name: 01-PUBLIC   | Code:                 | 0001                   |
| Q      OOOO 0-EXCEPTIONS     OOO1 01-PUBLIC | Type Public V   | Level:                | Other 🔻                |
| C C 5901                                    | Public  |                       | ouler .                |
| □ Q m 5996                                  | Last Update:  |                       |                        |
| 0596  | Address   |                       |                        |
| □ Q 🔐 3901                                  |   |                       |                        |
|   | DELETE SCHOOL   | State Zip             |                        |
| Q R 3990                                    |   | PA · •                |                        |
| 921   |   | ۵ او او               |                        |
| Q 🔐 3498                                    | students will have this school unassigned<br>stops will have this school unassigned                         | VB 🔍 VB               |                        |
| 3379  | runs will be invalidated as a result of this school   |                       | ♦                      |
|   | deletion  |                       | *                      |
| 6902  |   | -                     | Ŷ                      |
|   | Potential routes impacted will have to be   |                       |                        |
|   | escheduled, after re-resolving the corresponding  |                       |                        |
|   | nvalidated runs.All records and historical reports<br>elated to this school will be invalidated or removed. |                       |                        |
|   | Therefore do you want to proceed with this school   |                       |                        |
|   | deletion? This action cannot be undone.   |                       |                        |
| 3374  |   |                       |                        |
| 3315  |   |                       |                        |
| 5430  | OK CANCEL   |                       | T                      |
| 6480  |   |                       |                        |

- 1. Find the School to be removed in the scroll-down list and click on the **record icon** on the left of the School name. The selected School will be highlighted and its data will be displayed in the corresponding School Details text boxes.
- 2. Click on the **Delete School** button. A new window will appear showing details of the impact of deleting the School record and warning you that the action can not be undone.
- If you are sure you want to delete the School record click **OK**. Otherwise click Cancel.

#### Geocoding

Geocoding is the process of transforming a specific address to a pair of geographic coordinates (x and y values).

Some common tasks in Compass Route Builder, such as adding new Students, adding new Schools, or creating Stops, require that addresses are converted into coordinates. Compass uses these coordinates to produce Runs and Routes. You can use the **Coordinates Tool** to disclose x and y values associated with an address or point on the Map. Let's take a look at **Schools Management** to illustrate how this is done in Compass:

There are three different tools available for Geocoding under the address text box: A red button that is used to disclose address and coordinates, a green button that can be used to disclose only coordinates and a white button that links an address to its associated coordinates.

1

If you know the exact location on the Map, you can disclose the address and coordinates at the same time with the **red Geocoding** button as follows:

- Click first on the red Geocoding button.
- Zoom in and click on the exact location on the Map. The address and coordinates will be displayed in the corresponding text boxes.

| School Details Bell Info   | Programs                        |
|----------------------------|---------------------------------|
| School Name:               | Code:                           |
| Address<br>1014 W Front St | City State Zip<br>Tyler ▼ 75702 |
| X: -10610093.212           | Y: <u>3808912.04666</u> 🌂 😒 🕷   |
| Phone:                     | WAN:                            |
| Principal:                 | Asst. Prin/Dean:                |
| Office Mgr./Admin:         | FAX:                            |
| Walk to School<br>(mi.):   | Walk to Stop (mi.):             |
| Schedule:                  |                                 |
| School Level:              |                                 |

The green geocoding button gives the user the option to enter the address manually and even customize the way such address is displayed. To do so:

- Click on the green **Geocoding** button.
- Zoom in and click on the **exact location** on the Map. The **coordinates** associated with that location will be disclosed in the corresponding text boxes.
- Then, enter the **address information** as you want it to be displayed in the address text box.

The white geocoding button, depicted as a magnifier icon, allows the user to link an address to its corresponding coordinates.

To link an address with its associated coordinates:

- Enter the **address** in its corresponding text boxes.
- Click on the white **Geocoding** button. The coordinates will be disclosed below.

| School Details Bell Info | Programs                   |
|--------------------------|----------------------------|
| School Name:             | Code:                      |
| Address                  | City State Zip             |
| X: -10610089.032         | Y: 3808910.25517 🦥 🔍 🕷 🗲 🗕 |
| Phone:                   | WAN:                       |
| Principal:               | Asst. Prin/Dean:           |
| Office Mgr./Admin:       | FAX:                       |
| Walk to School<br>(mi.): | Walk to Stop (mi.):        |
| Schedule:                |                            |
|                          |                            |
| School Level:            | T                          |

| School Details Bell Info      | Programs                       |
|-------------------------------|--------------------------------|
| School Name:                  | Code:                          |
| Address<br>1125 W Franklin St | City State Zip<br>Tyler TX - V |
| X: -10610043.878              | Y: 3811515.41255 🌺 🐋 🕷         |
| Phone:                        | 7 WAN:                         |
| Principal:                    | Asst. Prin/Dean:               |
| Office Mgr./Admin:            | FAX:                           |
| Walk to School<br>(mi.):      | Walk to Stop (mi.):            |
| Schedule:                     |                                |
| School Level:                 |                                |

| School Details Bell Info Programs  | W Dobbe Stu  |
|--|--|
| School Name: Code:   | E Dobbs St   |
| Address     City     State     Zip       317 W 3rd St     Tyler     TX - ▼           | E Lake St  |
| X: -10609151.520 Y: 3807138.9267   | Geocoded Address   |
| Principal: WAN: WAN: Asst. Prin/Dean:  | Address: 317 W 3rd St, Tyler, TX, 75701<br>X: -10609151.52016034 |
| Office Mgr./Admin:         FAX:           Walk to School         Walk to Stop (mi.): | V-3rd St Y: 3807138.926767339<br>TX-11 Match Score: 100          |
| (mi.):   | TX-110 S 0 L PHI 31 Z 110  |
| Schedule:  | v 6th St   |
| School Level:  | W-7th St of E-7th-St of St II A                                  |

After an actual address is entered in its text box, if the user clicks on the white Geocoding button and the system recognizes its associated coordinates, a pop-up window with such address and geocoding information will be displayed on the Map on the corresponding location.

## NOTE: Missing Street Layout

Sometimes, even an actual address already existing in the database can't be found in the Map. This often happens because it takes some time to update the map's information after recent developments. In that case, the system might be able to geolocate the address and assign coordinates to it, but no graphic information of the current street layout would be displayed.

This feature is specially useful when admin users find Students with missing Geocoding information in the database.

When this occurs, a red warning question mark will be displayed on the left of the Student's ID.

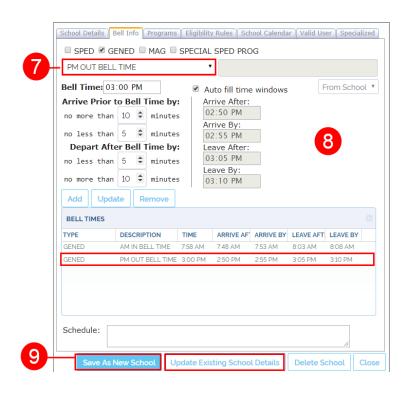
By following this method, the user can disclose the associated coordinates and save that information.

| SEARCH | SEARCH RESULTS: 9 STUDENTS (O SELECTED) |             |            |           |        |          |                  |         |  |  |  |  |
|--------|---|-------------|------------|-----------|--------|----------|------------------|---------|--|--|--|--|
| 0      | STUDENT ID                              | LAST NAME   | FIRST NAME | ADDRESS 🗢 | SCHOOL | CHG. REQ | CHG DT           | CARD ID |  |  |  |  |
| 0 🤦    | C0035479                                | BITENCOURT  |            |           |        |          | 5/30/2018 5:4    | 19:2    |  |  |  |  |
| 0 🤦    | <u>C0059417</u>                         | BITENCOURT  |            |           |        |          | 9/7/2018 3:54    | :49     |  |  |  |  |
| 7      | C0045679                                | CLEMENT     |            |           |        |          | 5/30/2018 5:49:2 |         |  |  |  |  |
| 7      | C0059394                                | ENOCH       |            |           |        |          | 9/9/2018 2:46    | 36      |  |  |  |  |
| 7      | C0021717                                | SLAWNYK     |            |           |        |          | 5/30/2018 5:4    | 19:2    |  |  |  |  |
|        | C0034902                                | BOWMAN      |            |           |        |          | 10/30/2018 2     | 20:     |  |  |  |  |
| 2      | C0026049                                | GOLDEN DEVE |            |           |        |          | 10/30/2018 2     | 20:     |  |  |  |  |

#### **Defining Bell Times**

Once a New School has been created, users will need to define the Bell Times. To do so:

| no more than<br>no less than | 5 ÷ minute<br>er Bell Time by<br>5 ÷ minute<br>10 ÷ minute | s 0<br>Ar<br>s 0<br>/: Le<br>s 0 | rive After:<br>7:48 AM<br>rive By:<br>7:53 AM<br>ave After:<br>8:03 AM<br>ave By:<br>8:08 AM |                      |                      |                     |
|------------------------------|--|----------------------------------|--|----------------------|----------------------|---------------------|
| BELL TIMES<br>TYPE<br>GENED  | DESCRIPTION<br>AM IN BELL TIME                             | TIME<br>7:58 AM                  | ARRIVE AF<br>7:48 AM   | ARRIVE BY<br>7:53 AM | LEAVE AFT<br>8.03 AM | LEAVE BY<br>8:08 AM |



- 1. Click on the **Bell Info** tab. The Bell Info window will appear.
- 2. Select the corresponding education type for this Bell Time. This can be Special Education, General Education, Magnet Programs or other Special Education Programs.
- Select the preferred Bell Time type from the dropdown menu, generally classified as AM/PM and IN/OUT times.
- 4. Enter a **Bell Time** value followed by **AM** or **PM** in the Bell Time box and assign the allowed time windows (i.e., earliest and latest for the bus to Arrive Prior to In Bell Time and Depart After Out Bell Time) in the corresponding boxes.
- 5. If you selected **Auto Fill**, these times will automatically populate their corresponding boxes. Otherwise, you will have to manually enter each preferred time in the provided text boxes.
- 7. Once the AM In Bell Time is ready, select **PM Out Bell Time** from the drop-down menu.
- 8. Then, follow the exact same steps as explained above for the AM In Bell Time.
- 9. Click Save As New School or Update Existing School Details as appropriate.

## Editing and Removing Bell Times

You can modify and Update the existing Bell Times.

| PM OUT BELL TIME       ▼         Bell Time:       03:00 PM       ✓ Auto fill time windows         Arrive Prior to Bell Time by:       Arrive After:       02:50 PM         no more than       10 ♥ minutes       Arrive By:       02:55 PM         Depart After Bell Time by:       02:55 PM       Leave After:         no less than       5 ♥ minutes       Leave After:         no iess than       5 ♥ minutes       03:05 PM         Leave By:       03:10 PM |                 |         |           |           |           |          |  |  |  |
|--|-----------------|---------|-----------|-----------|-----------|----------|--|--|--|
| BELL TIMES   |                 |         |           |           |           |          |  |  |  |
| ТҮРЕ   | DESCRIPTION     | TIME    | ARRIVE AF | ARRIVE BY | LEAVE AFT | LEAVE BY |  |  |  |
|  |                 | 7:58 AM | 7:48 AM   | 7:53 AM   | 8:03 AM   | 8:08 AM  |  |  |  |
| GENED  | AM IN BELL TIME |         |           |           |           |          |  |  |  |
| GENED<br>GENED   | AM IN BELL TIME | 3:00 PM | 2:50 PM   | 2:55 PM   | 3:05 PM   | 3:10 PM  |  |  |  |

#### You can also **Remove** an existing Bell Time.

| School Details Be            | ell Info Program                   | ns Eligibilit | y Rules Sch                        | iool Calenda | r Valid Us | er Spec | ialized |  |  |  |  |
|------------------------------|------------------------------------|---------------|------------------------------------|--------------|------------|---------|---------|--|--|--|--|
| 🗆 SPED 🗷 GE                  | SPED GENED MAG SPECIAL SPED PROG   |               |                                    |              |            |         |         |  |  |  |  |
| PM OUT BELL                  | PM OUT BELL TIME                   |               |                                    |              |            |         |         |  |  |  |  |
| Bell Time: 03:00 PM          |                                    |               |                                    |              |            |         |         |  |  |  |  |
| Arrive Prior to              | o Bell Time b                      | es 0          | rive After:<br>2:50 PM<br>rive By: |              |            |         |         |  |  |  |  |
| no less than<br>Depart Afte  |                                    |               |                                    |              |            |         |         |  |  |  |  |
| no less than<br>no more than | 5 <pre>5 <pre>\$ minut</pre></pre> | Les Le        | 3:05 PM<br>ave By:<br>3:10 PM      |              |            |         |         |  |  |  |  |
| Add Updat                    |                                    |               |                                    |              |            |         |         |  |  |  |  |
| BELL TIMES                   |                                    |               |                                    |              |            |         | 0       |  |  |  |  |
|                              | DESCRIPTION<br>AM IN BELL TIME     | TIME          | 7:48 AM                            | 7:53 AM      |            |         | Y       |  |  |  |  |
|                              | PM OUT BELL TIME                   |               | 2:50 PM                            | 2:55 PM      | 3:05 PM    | 3:10 PM |         |  |  |  |  |
| Schedule:                    |                                    |               |                                    |              |            | 1       |         |  |  |  |  |
| Save As N                    | lew School                         | Update Exis   | sting Schoo                        | l Details    | Delete S   | chool   | Close   |  |  |  |  |

To edit Bell Times:

- 1. Edit the values in the corresponding Bell Time text boxes.
- 2. Click on the **Update** button below. The new values will be displayed.
- 3. Click on Update Existing School Details.

To remove a Bell Time:

- 1. Select the Bell Time to be deleted by clicking on its row in the table.
- 2. Click the **Remove** button. The selected Bell Time will disappear from the list. Now you can add a new one if needed.
- 3. Click on **Update Existing School Details** when you finish.

## MANAGING STUDENTS

#### First Steps in Student Management

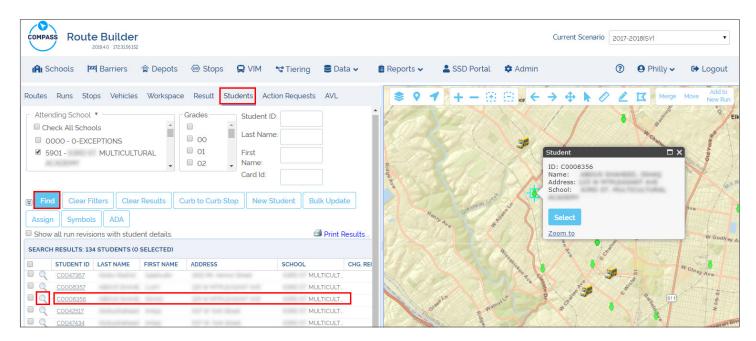
The Students Management tool allows customers to add new Students to the database and edit or delete existing student records.

The tool is displayed by clicking on the **Students** tab. This gives users access to the District's School list (Attending School window), Grades and Student's name and ID, which are search filters that can be used to narrow down Student search.

If you select one or more Schools and click on the **Find** button, a list of the enrolled Students that match the search criteria will be shown within the **Search Results** window. In addition, the resulting Students will be graphically displayed on the map.

You can select one or more Students by selecting the boxes next to them. The selected students' records will be highlighted and the student's location shown on the Map in the same color. A window with details of the last selected Student will also appear on the map.

The first column of the list also shows a search button (displayed as a magnifier) followed by Student ID, Last Name, First Name, Address and attending School. You can click search button to disclose the actual residence of each Student on the map.



Users can also access a comprehensive set of **Search Filters** that are hidden by default. These allow searching based on certain parameters for more effectiveness. Some of them are:

- Special or General Education.
- Eligibility for Transportation.
- Riding with Siblings.
- Medical.
- Especial Needs.
- Safety Devices.
- Other District Field's specifications.

To access the Filters:

- Click the expand icon. A new area containing these filters is displayed above it.
- Click the collapse icon to hide the search filters if preferred.

Within the last group of search filters, you will find a drop-down menu named District Field. We will review this topic later in the **District Fields** section.

| Routes Runs Stops Vehicles Workspace Result Students Action Requests AVL   |                 |  |  |  |  |  |  |  |  |  |
|--|-----------------|--|--|--|--|--|--|--|--|--|
| Attending School  Attending School  Attending School  Check All Schools OOOO - 0-EXCEPTIONS OO OI Check All Schools OO C |                 |  |  |  |  |  |  |  |  |  |
| Created/Modified Since   |                 |  |  |  |  |  |  |  |  |  |
| With Open SSD Request(s)       Inactive       Locked       Ungeocoded         Not Assigned Bus after       Not Assigned Stop after       Inactive       Inactive   |                 |  |  |  |  |  |  |  |  |  |
| <ul> <li>Eligible for Transportation</li> <li>NOT Eligible for Transportation</li> <li>Eligibility NOT Determined</li> <li>Admin</li> <li>ESY</li> <li>Transpass</li> <li>Bus Pass</li> <li>IEP</li> <li>Inclusion</li> <li>Joint Custody</li> <li>Medical</li> <li>Sibling Rider</li> <li>Aide</li> <li>Airde</li> <li>Air Cond</li> <li>Booster Seat</li> <li>Care Plan</li> <li>Car seat as age/size appropriate</li> <li>Nurse</li> <li>Oxygen</li> </ul>  |                 |  |  |  |  |  |  |  |  |  |
| Safety Vest       Seatbelt       Service Animal       Wheelchair       Walker       Tinted Windows         District Field <ul> <li>Transportation Status:</li> <li>Transportation Status:</li> <li>Image: Transportation Status:</li> <li< td=""><td></td></li<></ul>   |                 |  |  |  |  |  |  |  |  |  |
| Address: Zip Code: Use Geofence Exclude Transpass  |                 |  |  |  |  |  |  |  |  |  |
| Attachment Type: All   |                 |  |  |  |  |  |  |  |  |  |
| Find Clear Filters Clear Results Curb to Curb Stop New Student Bulk Update Assign  | Symbols ADA     |  |  |  |  |  |  |  |  |  |
| Show all run revisions with student details.   | 🖨 Print Results |  |  |  |  |  |  |  |  |  |

#### Understanding the Student Menu

If you click on a **Student's ID** within the Student Search Results list displayed after a search, the Student's record dialog pops-up.

| The Main tab displays the Student Entry Date and Last Update at the top. In      | I STUDENT  | × |
|--|--|---|
| addition, an hourglasss button can be  | Main District Fields Contacts Stop Locator Transportation Fee Case Mgmt. Change Requests ESY ECSE Attachments Tracking | Î |
| clicked to disclose a Record Change  | New Student Record Student Entry Date: 7/25/2017 602:09 PM Last Update: 7/25/2017 61712 PM 🖾 Docked 🗆 Inactive         |   |
| History Report.  | Last Name:       First Name:       Middle Name:       Date Of Birth:       07/29/2008       III                        |   |
| Next to it, Locked and Inactive status can                                       | Gender: Male   Ethnicity: Black  District:   |   |
| be selected.   | Student ID: CO047367 Attending School:   |   |
| Other sections contain different kinds of  | Grade: 04 ▼ Track: ▼ Zone: Zoned School: ▼   |   |
| information, such as:  | Enrolled School:   |   |
| a. Student Name, personal data, and  | Summer School:   |   |
| ID, District and Attending, Zoned,   | Program Special Needs  |   |
| Enrolled or Summer School (if  | Air Cond Safety Vest Tinted Windows  |   |
| applicable).   | Description: Booster Seat Seatbelt Walker b  |   |
| b. Program information.  | Pgm Notes: Care Plan Car seat as age/size appropriate  |   |
| c. Special Needs options.  | Eff. Date:   |   |
|  | End Date:  |   |
| d. Residence Address.  | Residence Address information  |   |
| e. Transportation Status.  | Transportation Status  |   |
| Residence Address and Transportation<br>Status are hidden by default and need to |  |   |
| be extended.   | Save Updates to Existing Student   | - |

| Residence Address holds:  | Residence Address information  | * |
|---|--|---|
| <ul> <li>Student's Address and coordinates.<br/>To know more about coordinates go<br/>to the <u>Geocoding</u> section included in<br/>School Management.</li> </ul>                     | Residence     City     State     Zip       Address     City     State     Zip       1910     Street     PA     Emergency Phone #:       Area: <ul> <li>Apt/Bldg:</li> </ul> E-mail:  |   |
| • <b>Copy as Pick Up/Drop Off.</b> Clicking<br>these tools, automatically copies<br>the Student's Residence Information<br>to the corresponding fields in the<br>Transportation dialog. | X:       -       2256       Y:       2926       Student Eligible for Transportation [Eligibility & Assignment History]         Student #:       Dist. to Attd. School (mi): 3.94       Dist.       Dist. to Attd. School (mi): 3.94         Mode and Exceptions       Mode and Exceptions       Dist. to Attd. School (mi): 3.94       Dist. |   |
| • Phone.  | Trans. Mode Bus •<br>Excep. Reason M MILEACE   |   |
| <ul> <li>Distance between Student's Address<br/>and Attending School.</li> </ul>  | Transportation Status  | * |
| <ul> <li>Transportation Mode and Exception<br/>Reasons.</li> </ul>  | Transportation Status: AM and PM   Days:  Notes:   |   |
| Emergency Phone and E-mail.   | Admin Bus Pass ESY IEP Inclusion Joint Custody Medical Sibling Rider Special Ed  |   |

**Transportation Status** allows selecting a time frame when the Student requires (if eligible) transportation (AM, PM, Both, etc) as well as the number of days.

Transportation Status also allows Notes and the selection of other specific characteristics.

#### **Understanding the District Fields Menu**

|                     | contacto | Stop Locator | Transportation | IEP | Case Mgmt. | Change Req | Jests | ESY | ECSE | Attachments | Tracking |
|---------------------|----------|--------------|----------------|-----|------------|------------|-------|-----|------|-------------|----------|
| dd New a            |          |              |                |     |            |            |       |     |      |             |          |
| 44 RECORD(S)        |          |              |                |     |            |            |       |     |      |             |          |
| EM                  | VALUE    |              |                |     |            |            |       |     |      |             |          |
| ir Condition        |          |              |                |     |            |            | ×     | -   |      |             |          |
| ssist               |          |              |                |     |            | • •        | ×     |     |      |             |          |
| ssist and Belt      |          |              |                |     |            |            | ×     |     |      |             |          |
| ssist and Harness   |          |              |                |     |            |            | ×     |     |      |             |          |
| sthma               |          |              |                |     |            |            | ×     |     |      |             |          |
| ee Sting Allergy    |          |              |                |     |            |            | ×     |     |      |             |          |
| elt                 |          |              |                |     |            | 4          | ×     |     |      |             |          |
| leeding Problem     |          |              |                |     |            | 4          | ×     |     |      |             |          |
| ooster Seat         |          |              |                |     |            |            | ×     |     |      |             |          |
| reathing Difficulty |          |              |                |     |            |            | ×     |     |      |             |          |
| ardiac              |          |              |                |     |            |            | ×     | -   |      |             |          |

Next to the Main tab you'll find the **District Fields** tab. This dialog allows customers to create personalized Fields, which are different from the available Special Needs Fields located within the Main menu, by clicking on the **Add New** tab in the upper left corner of the window (**a**).

Users can assign existing District Fields to New Students if required.

Users can always edit or remove existing District Fields by clicking the **Edit** or **Delete** icons respectively. These are located in the right column (**b**).

After clicking **Add New (a)** District Fields requests two kinds of information: A descriptive **Item** name (c) and a **Value (d)** for that Item. Most Values are Yes or No (Y/N).

For example, a Student may (Y) or may not (N) have Bleeding Problems.

Other District Fields might need more specific Values.

| STUDENT |           |            |            |                |     |            |        |          |     |      |             |          | × |
|---------|-----------|------------|------------|----------------|-----|------------|--------|----------|-----|------|-------------|----------|---|
|         |           |            |            | Transportation | IEP | Case Mgmt. | Change | Requests | ESY | ECSE | Attachments | Tracking | 1 |
| Item:   |           | e Details  | С          |                |     |            |        |          |     |      |             |          |   |
| Value:  |           |            |            |                |     |            |        | d        |     |      |             |          |   |
| Add     | Cance     |            |            |                |     |            |        |          |     |      |             |          |   |
| Save    | e Updates | to Existin | ig Student |                |     |            |        |          |     |      |             | Close    | j |

#### Understanding the Contacts Menu

Next to the District Fields tab you'll find the Contacts tab.

|                               | ORD(S)                        | 5 ciett | e Contact(s) | a   |             |          |            |            |          |        |   |   |
|-------------------------------|-------------------------------|---------|--------------|---|-------------|----------|------------|------------|----------|--------|---|---|
| I RECU                        | PERSON                        |         | RELATIONSHIP | ADDRESS   | PHONE       | AL       | F. PHONE   | EMPLOYER   | ۲ E      | E-MAIL |   |   |
| . 🧕                           | De                            | neen    | Parent       | 1910  |             |          |            |            |          |        |   | ۲ |
| dd N                          | lew Address                   | Delet   | e Address(es | )   Copy as P                                   | ick Up   Ca | py as Dr | op Off   C | opy To Sto | op Locat | or     |   |   |
|                               | lew Address                   | Delet   | e Address(es |   |             | py as Dr | op Off   C | opy To Sto | op Locat | or     |   |   |
| 3 REC                         |                               | Delet   | e Address(es | ) Copy as P                                     |             | py as Dr | op Off   C |            | CTIVE    | 0      |   |   |
| 3 REC                         | CORD(S)                       | Delet   | e Address(es | ) Copy as P<br>TYPE<br>SIS Address              | ick Up   Co | py as Dr | op Off   C |            | ACTIVE   | •      |   |   |
| 3 REC<br>AD<br>1 19:<br>2 19: | CORD(S)<br>DDRESS<br>10<br>10 | Delet   | e Address(es | )   Copy as P<br>TYPE<br>SIS Address<br>Mailing | ick Up   Co | py as Dr | op Off   C |            | ACTIVE   | 0      | d |   |
| 3 REC<br>AD<br>1 19:<br>2 19: | D <b>RESS</b>                 | Delet   | e Address(es | ) Copy as P<br>TYPE<br>SIS Address              | ick Up   Co | py as Dr | op Off   C |            | ACTIVE   | •      | d |   |
| 3 REC<br>AD<br>1 19:<br>2 19: | CORD(S)<br>DDRESS<br>10<br>10 | Delet   | e Address(es | )   Copy as P<br>TYPE<br>SIS Address<br>Mailing | ick Up   Co | py as Dr | op Off   C |            | ACTIVE   | •      | d |   |

Within this dialog, you can access the existing Student Contact record on the upper sector and the Student Address details below.

You can **Add New Contact** or **Delete Contact** by clicking the corresponding labels (**a**) and edit the record by clicking the **Edit** button (**b**) located on the right of the table.

You can also Add New Address, Delete Address, copy an address as a Pick Up or Drop Off location, or copy any address to the Stop Locator (c).

Additionally, records can be Edited by clicking the corresponding Edit button (**d**).

| TUDENT                         |                          | 2  |
|--------------------------------|--------------------------|--|
|                                | ocator Transportation IE | P Case Mgmt. Change Requests ESY ECSE Attachments Tracking |
| Contact Details                |                          |  |
| Person:                        |                          | e  |
| Relationship:                  |                          | •  |
| Address:                       |                          |  |
| Phone:                         | Alt. Phone:              | E-mail:  |
| Employer:                      |                          |  |
| Emergency Contact              |                          |  |
| Notes:                         |                          |  |
|                                |                          |  |
|                                |                          |  |
|                                |                          | Add Contact Cancel   |
| Add Address                    |                          |  |
| Address Cit                    |                          |  |
|                                | <b>T</b>                 | <b>f</b>   |
| Area: • Apt/Bldg:              |                          |  |
| X: Y:                          |                          |  |
|                                |                          |  |
| Address Type:                  | •                        |  |
| Notes:                         |                          |  |
|                                |                          |  |
| Add Cancel                     |                          |  |
| Save Updates to Existing Stude | ent                      | Close  |

After clicking the **Add New Contact** or the **Add New Address** labels ( $\mathbf{a}$  and  $\mathbf{c}$  in the previous figure), new dialogs display ( $\mathbf{e} \& \mathbf{f}$ ) allowing the input of Contact and Address details.

## **Finding Existing Students**

The Students Management tool is disclosed in Compass by clicking on the Student tab and allows the user to find Student records or display their residence location on the map. It is essential to know how to find Students before their information can be used for any routing work.

Searching for Students in Compass involves the selection of search filters. Once the Students Management menu is available, a set of search filters, including Attending Schools, Grades and Student's Name and ID, become visible.

Another comprehensive set of filters remains hidden by default, but it can be disclosed by clicking the **Expand** button located next to the **Find** button, as shown below. Once used, these filters can be hidden again by clicking the **Collapse** button (this results from the expansion of the filter section).

To find existing Students:

1. Click Students in the secondary toolbar. The Student menu is displayed.

| Check Al       | chool V<br>Schools<br>D-EXCEPTIONS          | •              | Grades         | *           |                   |               |   |  |
|----------------|---|----------------|----------------|-------------|-------------------|---------------|---|--|
|                | fied Since General Ed SSD Request(s)        | 0              | Locked 🗆 Un    | geocoded    |                   |               |   |  |
| ũ              | Transportation 🗆                            |                | for Transporta |             | gibility NOT Dete |               |   |  |
| 🗆 Aide 🗆 Ai    | SY Transpass<br>Cond Booster<br>Seatbelt Se | Seat 🔲 Care    | Plan 🔲 Car s   | eat as age/ | size appropriate  | e 🗆 Nurse 🔲 ( | - |  |
| District Field |   | ▼<br>Zip Code: |                | Use Ge      | Transportation    |               | T |  |
| Address:       |   |                |                |             |                   |               |   |  |

- 2. Select the appropriate **Attending School** on the left of the dialog.
- 3. Select the corresponding Grade if known.
- 4. Input the Student ID and Name, and Card ID if known.
- 5. To narrow down your search, click the **Expand** icon on the left of the **Find** button to display the comprehensive set of search filters.
- 6. Once available, select the appropriate boxes and/or select other preferred filters in the drop-down menus. You can also enter **Address** and **Zip Code** in the provided text boxes (District Field, Transportation Status and Attachment Type).
- 7. Click Find.

| After clicking the <b>Find</b> button, a list of matching Students will be displayed below. |
|---|
|---|

|   | STUDENT ID      | LAST NAME | FIRST NAME | ADDRESS | SCHOOL | CHG. REQ | CHG DT        | CARD ID |
|---|-----------------|-----------|------------|---------|--------|----------|---------------|---------|
|   | <u>C0047360</u> |           |            |         |        |          | 4/30/2018 9   | 36:     |
|   | C0042569        |           |            |         |        |          | 5/19/2018 21  | 6:5     |
|   | C0042568        |           |            |         |        |          | 5/19/2018 21  | 6:5     |
|   | C0020726        |           |            |         |        |          | 5/19/2018 2:1 | 6:5     |
|   | C0020207        |           |            |         |        |          | 5/19/2018 21  | 6:5     |
|   | C0050570        |           |            |         |        |          | 3/2/2018 8:20 | 0:2     |
|   | C0051148        |           |            |         |        |          | 9/7/2017 2:04 | 1:3     |
| Q | C0050569        |           |            |         |        |          | 3/2/2018 8:20 | D:1     |

Depending on the search filters used and how specific these are, the resulting list can contain one or more students.

For example, if you input Student's ID, only one student should be in the list. But it you select Attending School and Grade, the list should display many Students.

Remember that you can disclose the Students' location on the map by clicking the search icon (shown as a magnifier) next to the Student ID.

## Adding New Students

As you already know, the Students Management tool displayed in Compass under the Student tab allows users to find, view and edit Students' information, assign Stops, etc.

With this tool, users also have the option to create New Student records and Add them to the existing database.

| Route Builder   |
|---|
| IAI Schools 124 Barriers 🎓 Depots 🐵 Stops 😡 VIM 😌 Tiering 🛢 Data マ 🛔 Reports マ 🔺 SSD Portal   |
| Routes Runs Stops Vehicles Workspace Result Students Action Requests AVL  |
| Attending School  Attending School  Creck All Schools OOOO - 0-EXCEPTIONS S901 - 63RD ST. MULTICULTURAL ACADEMY ACADEMY ACADEMY ACADEMY ACADEMY Attending School  Creck All Schools Action and Action |
| Created/Modified Since  |
| Special Ed 🛛 General Ed 🗍 Magnet  |
| With Open SSD Request(s) Inactive Locked Ungeocoded   |
| Not Assigned Bus after     Not Assigned Stop after  |
| Eligible for Transportation   |
| Admin BESY Transpass Bus Pass IEP Inclusion Joint Custody Medical Sibling Rider   |
| 🛛 Aide 🐁 Air Cond 🐁 Booster Seat 🐁 Care Plan 🔍 Car seat as age/size appropriate 🐁 Nurse 🐁 Oxygen  |
| Safety Vest Seatbelt Service Animal Wheelchair Walker Tinted Windows  |
| District Field Transportation Status:   |
| Address: Zip Code: Use Geofence Exclude Transpass   |
| Attachment Type: All  |
| Tind Clear Filters Clear Results Curb to Curb Stop New Student Bulk Update Assign Symbols ADA   |
| Show all run revisions with student details.  |

To Add a New Student:

- 1. Click the **Students** label located in the secondary toolbar.
  - The Students menu appears.
- 2. Click **New Student** above the search results table to have the New Student window displayed.

#### **Compass User Guide**

| Main District Fields Contacts  | Stop Locator Transportation | on IEP Case Mgmt. Change R | equests ESY ECSE Attachmer                                    | nts Tracking    | 3.     | Enter personal and administrative                                  |
|--|-----------------------------|----------------------------|---|-----------------|--------|--|
| New Student Record   | Student Entry Date:         | Last Up                    |   | 🖾 🗆 Locked 🗆 In | active | data in the first section. You will find several drop-down menus   |
| Last Name:   | First Name:                 | Middle Name:               | Date Of Birth:  | i iii           |        | that allow you to select <b>Attending</b>                          |
| Gender:  | Ethnicity:                  | •                          | District:   | •               |        | School as well as Zone School,                                     |
| Student ID:  |                             | Attending School:          |   | •               | 3      | Enrolled School and Summer   |
| Grade: • Track:  | ▼ Zone:                     | Zoned School:              |   | •               |        | School.  |
|  |                             | Enrolled School:           |   | •               | 4.     | Enter the Student's Program infor-                                 |
|  |                             | Summer School:             |   | •               |        | mation if needed.  |
| Program  |                             | Special Needs              | - Consider Assisted A   |                 | 5.     | Select Special Needs if required.                                  |
| Acronym:   |                             |                            | n 🛛 Service Animal 📥<br>Vest 🔲 Tinted Windows                 | 5               |        | Click 6 and 7 to disclose and edit                                 |
| Description:   |                             | Booster Seat Seatbe        |   |                 |        | the information in those sections                                  |
| Pgm Notes:   |                             | Care Plan Car se           | at as age/size appropriate<br>Wheelchair                      |                 |        | (see below).   |
| Eff. Date:   |                             |                            |   |                 |        |  |
| End Date:  |                             |                            |   | 6               |        | _  |
| Residence Address inform   | nation                      |                            |   |                 | ≽      | ĮĻ   |
| Transportation Status  |                             |                            |   |                 | ≽      | •  |
|  |                             |                            |   |                 |        |  |
|  |                             |                            |   |                 |        |  |
| Save As New Student  |                             |                            |   |                 | Close  |  |
|  |                             |                            |   |                 |        |  |
| Residence Address inforr   | nation                      |                            |   |                 | 🗙 б.   | Extend and Input the Student's                                     |
| Residence  |                             | Contact                    |   |                 |        | Residence information including                                    |
| Address  | City State                  |                            | y Phone #:  |                 | 6      | complete Address, Coordinates                                      |
| 1910 Street  | PA                          |                            |   |                 |        | and Phone, and add Emergency<br>Phone and E-mail.                  |
| Area: • Apt/B  | ldg:                        | E-mail:                    |   |                 |        |  |
| Y: 2250 Y:   | 2926                        |                            | 111 C   |                 |        | If needed, use the <b>Coordinates</b>                              |
| X:         -         2256         Y:           Copy as Pick Up Drop Off         -          -         -         - |                             |                            | gible for Transportation<br><u>&amp; Assignment History</u> ] |                 |        | <b>Tool</b> to disclose the Student's Residence coordinates (Geoc- |
|  |                             | (                          |   |                 |        | oding). To learn more about this                                   |
| Phone #:   | Dist. to Attd. School       | (mı): 3.94 [?]             |   |                 |        | tool, read the <u>Geocoding</u> section                            |
| Mode and Exceptions  |                             |                            |   |                 |        | in School Management.  |
| Trans. Mode Bus  | •                           |                            |   |                 |        | If necessary, select the Trans-                                    |
| Excep. Reason M - MILE   | AGE 🔻                       |                            |   |                 |        | portation Modes and Exception                                      |
|  |                             |                            |   |                 |        | Reasons from the corresponding                                     |

The upper-right corner of the dialog allows you to select Locked or Inactive status if necessary. Then:

essary, select the Transion Modes and Exception ns from the corresponding drop-down menus.

#### TIP: Copy as Pick-Up or Drop-Off

After you complete the Student's Residence information, you have the option to copy such data as Pick Up or Drop Off information as well. This will save you time when entering Transportation data.

To do so:

- Click Copy as Pick Up or Drop Off below the coordinates tool as preferred.
- Once copied, you will find the same data within the Transportation window.

To review, find the Transportation tab on top of the New Student window and click on it.

You can also check the **Distance to Attending School** by clicking on the [?] button in the bottom right corner of the Residence section.

| Transportation Sta | atus: AM and P | M T | Days:     |               |         |               | 7          |
|--------------------|----------------|-----|-----------|---------------|---------|---------------|------------|
| Notes:             |                |     |           |               |         |               | 1.         |
| Admin Bus          | Pass ESY       | IEP | Inclusion | Joint Custody | Medical | Sibling Rider | Special Ed |

- Extend and select Transportation Status, add Notes and select the optional categories if needed.
- 8. At the bottom of the dialog, click **Save As New Student** to save the Student's Record.

The New Student Record dialog allows users to input a wide range of information, but not all the fields are required to create a New Student Record. If you try to save your data as a New Student but the information provided is not enough, the system will prompt you to fill in the necessary fields.

#### **Adding District Fields**

Once you have added the New Student, you can move on to **District Fields** by clicking the District Fields tab next to the Main tab.

|   |                   |                  |                     |              |   |                                       |          |           |                | _     |
|---|-------------------|------------------|---------------------|--------------|---|---------------------------------------|----------|-----------|----------------|-------|
| Main District Fie   | elds Contacts St  | p Locator    Tra | insportation    IEP | Case Mgmt.   | Change Requ   | ests    ES                            | Y ECSE   | Attachmer | nts Trackin    | g     |
| Add New   |                   |                  |                     |              |   |                                       | -1       |           |                |       |
| DISTRICT FIELDS   | s                 |                  |                     |              |   |                                       |          |           |                |       |
| ITEM  | VALUE             |                  |                     |              |   |                                       |          |           |                |       |
|   |                   |                  |                     |              |   |                                       |          |           |                |       |
|   |                   |                  |                     |              |   |                                       |          |           |                |       |
| TUDENT  |                   |                  |                     |              |   |                                       |          |           |                | ×     |
| Main District Fiel  | lds Contacts Sto  | p Locator   Trai | nsportation IEP     | Case Mgmt.   | Change Reque  | sts ES                                | ECSE     | Attachmen | ts Tracking    | 3     |
| Custom Attri  |                   |                  |                     |              |   | _                                     |          |           |                |       |
| Item:   |                   |                  |                     |              | 2   |                                       |          |           |                |       |
|   |                   |                  |                     |              |   |                                       |          |           |                |       |
| Value:  |                   |                  |                     |              |   |                                       |          |           |                |       |
| Add Car   | ncel              |                  |                     |              | 4   |                                       |          |           |                |       |
| - Augusta - Cui   |                   |                  |                     |              |   |                                       |          |           |                |       |
| Source Also No  | ow Student        | A                |                     |              |   |                                       |          |           |                | Class |
| Save As Ne  | ew Student        | 5                |                     |              |   |                                       |          |           |                | Close |
| Save As Ne  | ew Student        | 5                |                     |              |   |                                       |          |           |                | Close |
|   | ew Student        | 5                |                     |              |   |                                       |          |           |                |       |
|   | ew Student        | 5                |                     |              |   |                                       |          |           |                | Close |
| TUDENT  | ew Student        |                  | nsportation ) IEP   | Case Mgmt.   | Change Reque  | sts ES1                               | CSE      | Attachmen | ts Tracking    | ×     |
| TUDENT  |                   |                  | nsportation    IEP  | Case Mgmt.   | Change Reque  | sts ES)                               | ( ECSE   | Attachmen | ts Tracking    | ×     |
| TUDENT  |                   |                  | nsportation   IEP   | ) Case Mgmt. | Change Reque  | sts EST                               | CSE      | Attachmen | ts Tracking    | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)   |                   |                  | nsportation    IEP  | Case Mgmt.   |   | sts ES                                | ECSE     | Attachmen | ts ) Tracking  | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM   | ids Contacts Sto  |                  | nsportation    IEP  | Case Mgmt.   | Change Reque  | •<br>× -                              | / ] ECSE | Attachmen | ts ) Tracking  | ×     |
| TUDENT<br>Main District Fiel<br>Add New   | ilds Contacts Sto |                  | nsportation    IEP  | ) Case Mgmt. | 4   | o<br>X<br>X                           | () ECSE  | Attachmen | ts ) Tracking  | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition  | ilds Contacts Sto |                  | nsportation    IEP  | Case Mgmt.   | 4<br>4  | •<br>X ^<br>X X                       | () ECSE  | Attachmen | ts Trackin¢    | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition<br>Assist<br>Assist and Belt   | Ids Contacts Sto  |                  | nsportation   IEP   | Case Mgmt.   | 8<br>8<br>8<br>8  | •<br>× × ×                            | () ECSE  | Attachmen | ts ] Trackinę  | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition<br>Assist<br>Assist and Belt<br>Assist and Harness<br>Asthma   | Ids Contacts Sto  |                  | nsportation   IEP   | Case Mgmt.   | 8<br>8<br>8<br>8  | ×<br>×<br>×<br>×<br>×                 | ECSE     | Attachmen | ts Tracking    | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>TEM<br>Air Condition<br>Assist<br>Assist and Belt<br>Assist and Harness<br>Asthma<br>Bee Sting Allergy   | Ids Contacts Sto  |                  | nsportation ] IEP   | Case Mgmt.   | 8<br>8<br>8<br>8<br>8   |                                       | () ECSE  | Attachmen | ts    Trackinç | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition<br>Assist<br>Assist and Belt<br>Assist and Harness<br>Asthma<br>Bee Sting Allergy<br>Belt  | Ids Contacts Sto  |                  | nsportation ] [IEP  | Case Mgmt.   | 8<br>8<br>8<br>8<br>8<br>8<br>8<br>8  |                                       | () ECSE  | Attachmen | ts   Trackin¢  | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition<br>Assist  | Ids Contacts Sto  |                  | nsportation    IEP  | Case Mgmt.   | 8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8 |                                       | C) ECSE  | Attachmen | ts ) Tracking  | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition<br>Assist<br>Assist and Belt<br>Assist and Belt<br>Assist and Harness<br>Asthma<br>Bee Sting Allergy<br>Belt<br>Bleeding Problem<br>Booster Seat | Ids Contacts Sto  |                  | nsportation    IEP  | Case Mgmt.   | 8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8 | × × × × × × × × × × × × × × × × × × × | ECSE     | Attachmen | ts   Tracking  | ×     |
| TUDENT<br>Main District Fiel<br>Add New<br>44 RECORD(S)<br>ITEM<br>Air Condition<br>Assist<br>Assist and Belt<br>Assist and Belt<br>Assist and Harness<br>Asthma<br>Bee Sting Allergy<br>Belt<br>Bleeding Problem                 | Ids Contacts Sto  |                  | nsportation ) IEP   | Case Mgmt.   | 8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8<br>8 |                                       | () ECSE  | Attachmen | ts   Tracking  | ×     |

- 1. Then, click **Add New** if you want to create a New District Field for the Student. A Custom Attribute Details window appears.
- 2. Enter a descriptive name for the **Item**.
- 3. Enter the appropriate Value.
- 4. Click Add.
- 5. Finally, click Save As New Student.

Once you do this, the New District Field will appear in the existing District Field list.

#### Adding Contacts

Move on to Contacts by clicking on the Contacts tab on the right of the Main tab if you want to Add Contacts to the New Student's record.

|          | N RECORDS)    |                 |              |              |                |                  |        |  |
|----------|---------------|-----------------|--------------|--------------|----------------|------------------|--------|--|
|          | PERSON        | RELATIONSHIP    | ADDRESS      | PHONE        | ALT. PHONE     | EMPLOYER         | E-MAIL |  |
|          |               |                 |              |              |                |                  |        |  |
|          |               |                 |              |              |                |                  |        |  |
|          |               |                 |              |              |                |                  |        |  |
|          |               |                 |              |              |                |                  |        |  |
|          |               |                 |              |              |                |                  |        |  |
| l New Ac | ldress   Dele | ete Address(es) | Copy as Pick | Up   Copy as | Drop Off   Cop | y To Stop Locato | or     |  |
| DRESSES  | (N RECORDS)   |                 |              |              |                |                  |        |  |
|          | ADDRE         | SS              | TYPE         |              | NOTES          | ACTIVE           |        |  |
|          |               |                 |              |              |                |                  |        |  |
|          |               |                 |              |              |                |                  |        |  |
|          |               |                 |              |              |                |                  |        |  |

When the Contacts window appears:

Click the Add New Contact and/or Add New Address labels to disclose the corresponding information.

| in placificer relus          | Contacts Stop Loo | cator Transportation | IEP Case Mgmt. Change | Requests ESY | ECSE Attachm | ents Trackir |
|------------------------------|-------------------|----------------------|-----------------------|--------------|--------------|--------------|
| Contact Details              | L                 |                      |                       |              |              |              |
| Person:                      |                   |                      |                       |              |              |              |
| Relationship:                |                   |                      | 2                     |              |              |              |
| Address:                     |                   |                      |                       |              |              |              |
| Phone:                       |                   | Alt. Phone:          | E-mail:               |              |              |              |
| Employer:                    |                   |                      |                       |              |              |              |
| Add Address                  | Cit               |                      |                       | 4 Ad         | d Contact    | Cancel       |
| Address                      |                   | y State Zi           | P                     |              |              |              |
|                              | Apt/Bldg:         |                      |                       |              |              |              |
|                              |                   |                      |                       |              |              |              |
| Area:                        | ▼ Apt/Bldg:       |                      |                       | _0           |              |              |
| Area:                        | ▼ Apt/Bldg:       |                      |                       | -7           |              |              |
| Area:<br>X:<br>Address Type: | Apt/Bidg:     Y:  |                      |                       | -7           | ]            |              |

Within the Contact Details window:

×

- 1. Enter Person and Relationship with the Student.
- 2. Enter the Address, Phone, E-mail and employer if required.
- 3. Check Emergency Contact if appropriate and enter any Notes if needed.
- 4. Click the Add Contact button. The Contact Details window will close and you will see the new Contacts added in the records table.

Within the Add Address window:

- 5. Enter Address, City, State and ZIP code.
- 6. Use the Coordinates Tool to disclose the address coordinates. To learn more about this tool, read the *Geocoding* section.
- 7. Select an address type and enter any necessary Notes.
- 8. Click Add.
- 9. Click Save As New Student. The Address window will close and you will see the new Address added in the records table.

## Editing Student Information

Before editing any existing Student's information, you need to find the Student Record. Review <u>Finding Existing Students</u> for more details. Once you have found the Student whose information you want to edit, click the corresponding Student ID to disclose the **Student Record** dialog.

At the upper-right corner of the dialog you have the option to select or deselect the Locked and Inactive status of the Student. Then, similarly to what is explained in the Add New Student section, follow these steps:

| New                        | Student Record             | Student E   | ntry Date: | 6/13/2017 2:01:01 PN |                  |                 |            |            | ive |
|----------------------------|----------------------------|-------------|------------|----------------------|------------------|-----------------|------------|------------|-----|
| Last Name:                 | Acton                      | First Name: | Honey      | Middle Name:         |                  | Date Of Birth:  | 09/04/2010 |            |     |
| Gender:                    | Female 🔻                   | Ethnicity:  |            | •                    | 1                | District:       | •          |            |     |
| Student ID:                | 000167122                  |             |            | Attending School:    | 111 - FRANKLIN E | s               | •          |            |     |
| Grade: 01                  | <ul> <li>Track:</li> </ul> | • 2         | Zone:      | Zoned School:        |                  |                 | •          |            |     |
|                            |                            |             |            | Enrolled School:     |                  |                 | •          |            |     |
|                            |                            |             |            | Summer School:       |                  |                 | •          |            |     |
| Program                    |                            | <b>_</b>    |            | Special Needs        |                  |                 |            |            |     |
| -<br>Acronym:              |                            |             | 2          | Aide                 | Oxygen S         | ervice Animal   | • 6        |            |     |
|                            |                            |             | •          | Air Cond             | Safety Vest 🔲 T  | inted Windows   | *   3      |            |     |
| Description:               |                            |             |            | Booster Seat         | Seatbelt 🔲 W     | /alker          |            |            |     |
| Pgm Notes:                 |                            |             |            | Care Plan            | Car seat as age/ | size appropriat | e          |            |     |
| - gin notcor               |                            |             |            | Nurse                | -                | /heelchair      |            |            |     |
| Eff. Date:                 |                            |             |            |                      |                  |                 |            |            |     |
| End Date:                  |                            |             |            |                      |                  |                 |            | 4          |     |
| End Date.                  |                            |             |            |                      |                  |                 |            | - <b>-</b> |     |
| Residence A                | ddress informa             | ation 📕     |            |                      |                  |                 |            |            | ≽   |
| Transportat                | ion Status                 |             |            |                      |                  |                 |            |            | *   |
| Hansportat                 | IOH Status                 |             |            |                      |                  |                 |            |            | _   |
|                            |                            |             |            |                      |                  |                 |            |            |     |
| Residence A<br>Transportat |                            | ation -     |            |                      |                  |                 |            | -1         |     |

| 1. | Under the Main tab, edit person-          |
|----|---|
|    | al and administrative data in the         |
|    | first section. You will find several      |
|    | drop-down menus that allow you            |
|    | to select <b>Attending</b> School as well |
|    | as Zone School, Enrolled School           |
|    | or <b>Summer</b> School.                  |

- Edit the Student's Program information if needed.
- Select or deselect any Special Needs if required.
  - Click 4 and 5 to disclose and edit the information in those sections (see below).

 $\hat{\mathbf{U}}$ 

| Address   | City             | State Zip                        | Emergency Phone #:  |
|---|------------------|----------------------------------|---|
| 6408 NW CHERRY ST                               | VANCOUVE         |                                  |   |
| Area: • Apt/B                                   | ldg:             |                                  | E-mail:   |
| X: -13657404.8829 Y:<br>Copy as Pick Up Drop Of | 5727557.9031     | ۵ 🐌 🧶                            | Student Eligible for Transportation<br>[Eligibility & Assignment History] |
| Phone #:  | Dist. to Attd. S | School (mi): <mark>1.08</mark> [ | 2]  |
|   |                  |                                  |   |
| Mode and Exceptions                             |                  |                                  |   |
| Mode and Exceptions<br>Trans. Mode              | T                |                                  |   |

 Extend and edit the Student's Residence information including complete Address, coordinates and Phone, and add Emergency Phone and E-mail.

Use the **Coordinates Tool** to disclose the Student's Residence coordinates (Geocoding). To learn more about this tool, read the <u>Geocoding</u> section in School Management.

If necessary, select the **Transportation Modes** and **Exception Reasons** from the corresponding drop-down menus.

## TIP: Copy as Pick-Up or Drop-Off

After you complete the Student's Residence information, you have the option to copy such data as Pick Up or Drop Off information as well. This will save you time when entering Transportation data.

#### To do so:

- Click Copy as Pick Up or Drop Off as preferred.
- Once copied, you will find the same data within the Transportation window.
   To review, find the Transportation tab on top of the New Student window and click on it.

| Transporta | tion Status      |            |     |           |               |         |               | \$         |
|------------|------------------|------------|-----|-----------|---------------|---------|---------------|------------|
| Transporta | tion Status:     |            | •   | Days:     |               |         |               | 5          |
| Notes:     |                  |            |     |           |               |         |               | <i>ii</i>  |
| 🗆 Admin    | Bus Pass         | ESY        | IEP | Inclusion | Joint Custody | Medical | Sibling Rider | Special Ed |
| Save L     | Jpdates to Exist | ing Studen | t   | 6         |               |         |               | Close      |

- 5. Extend and select Transportation Status, add Notes and select the optional categories if needed.
- 6. Click Save Updates to Existing Student.

#### Adding, Editing or Deleting District Fields Menu

3

Move on to District Fields by clicking on the District Fields tab next to the Main tab if you need to add, edit or delete any of them.

| Add New     |                         |                     |              |                      |                  |       |       |    |
|-------------|-------------------------|---------------------|--------------|----------------------|------------------|-------|-------|----|
| 2 RECORD(S) |                         |                     |              |                      |                  |       |       |    |
| ΈM          | VALUE                   |                     |              |                      | Ec               | dit   |       |    |
| USIC T/R    |                         |                     |              | X                    |                  |       |       |    |
| USIC W/F    |                         |                     |              | * ×–                 |                  | -1-4- |       | 1  |
|             |                         |                     |              |                      |                  | elete |       |    |
|             |                         |                     |              |                      |                  | elete |       |    |
|             |                         |                     |              |                      |                  | elete |       |    |
|             |                         |                     |              |                      |                  | eiete |       |    |
| Carrollad   | te to Suisies Student   |                     |              |                      |                  |       | class |    |
| Save Upda   | tes to Existing Student |                     |              |                      |                  |       | Close |    |
| Save Upda   | tes to Existing Student |                     |              |                      |                  |       | Close |    |
|             | tes to Existing Student |                     |              |                      |                  |       |       |    |
| Save Upda   | tes to Existing Student |                     |              |                      |                  |       | Close | 2. |
| UDENT       |                         | ransportation   IEP | Case Mgmt. ( | Change Requests   ES | Y ECSE Attachmer |       |       | 2. |

. Click on the **Add New, Edit** or **Delete** buttons as needed.

Clicking the Add New or the Edit buttons discloses the respective **Custom Attribute Details** dialogs.

- To add or edit a District Field, enter a descriptive name for the Item and a Value in the Custom Attribute Details dialog and click Add, if you are adding a new District Field, or Save, if you are editing an existing one.
- 3. Finally, click Save Updates to Existing Student.

#### **TIP: Items and Values**

Cancel

Remember that most Items have Yes or No Values (e.g. a Student will or will not have a particular health problem), although certain District Fields might need more specific Values.

#### Setting Student Records to Inactive

Student records can never be deleted. On the contrary, they are always kept in the database. However, users might want some Students to be temporarily or permanently removed from their workflows so that they don't affect the routing plans. In order to get this done, users have the option to set Student records to **Inactive**.

| STUDENT          |                 |                |              |                     |                |                   |            | 1                 |
|------------------|-----------------|----------------|--------------|---------------------|----------------|-------------------|------------|-------------------|
| Main District Fi | elds Contacts S | top Locator Tr | ansportation | IEP Case Mgmt. Cl   | ange Requests  | ESY ECSE Attack   | iments     |                   |
| New 5            | Student Record  | Student E      | Entry Date:  | 6/13/2017 2:01:01 P | M by Last Upda | ate: 10/30/2018   | 6:09:53 PM | Locked 🗆 Inactive |
| Last Name:       | Acton           | First Name:    | Honey        | Middle Name:        |                | Date Of Birth:    | 09/04/2010 |                   |
| Gender:          | Female 🔻        | Ethnicity:     |              | •                   |                | District:         | ,          | ·                 |
| Student ID:      | 000167122       |                |              | Attending School    | 111 - FRANKLI  | N ES              | •          |                   |
| Grade: 01        | Track:          | •              | Zone:        | Zoned School:       |                |                   | •          |                   |
|                  |                 |                |              | Enrolled School:    |                |                   | •          |                   |
|                  |                 |                |              | Summer School:      |                |                   | •          |                   |
| Program          |                 |                |              | Special Needs       |                |                   |            |                   |
| Acronym:         |                 |                |              | 🔲 Aide 🛛            | Oxygen 🛛       | Service Animal    | *          |                   |
|                  |                 |                |              | Air Cond            | Safety Vest    | Tinted Window     | Б          |                   |
| Description:     |                 |                |              | Booster Seat        | Seatbelt       | Walker            |            |                   |
| Pgm Notes:       |                 |                |              | Care Plan           | Car seat as a  | ge/size appropria | ite        |                   |
|                  |                 |                |              | Nurse               | (              | Wheelchair        |            |                   |
| Eff. Date:       |                 |                |              |                     |                |                   |            |                   |
| End Date:        |                 |                |              |                     |                |                   |            |                   |

To assign this status:

- Find the Student following the exact same steps described in the *Finding Existing Students* section.
- · Click on the Student Record icon to display the Student window and
- Check the Inactive box on the upper right corner of the window.
- You can now Save Updates to Existing Student at the bottom of the window.

Notice that when **Inactive**, a Student won't be listed in any search results unless the Inactive filter is selected first within the comprehensive set of search filters.

Remember that these filters are hidden by default but you can always disclose them by clicking on the **Expand** icon next to the Find button. The complete set of filters will be displayed above.

| Routes Runs Stops Vehicles Workspace Result Students Action Requests                             |
|--|
| Created/Modified Since   |
| Special Ed General Ed Magnet   |
| With Open SSD Request(s) Inactive Locked Ungeocoded  |
| Not Assigned Bus after     Not Assigned Stop after   |
| 🗆 Eligible for Transportation 🔍 NOT Eligible for Transportation 🔍 Eligibility NOT Determined     |
| Admin 🛛 ESY 🖓 Transpass 🖓 Bus Pass 🖓 IEP 🖓 Inclusion 🖓 Joint Custody 🖓 Medical 🖓 Sibling Rider   |
| 🗌 Aide 🔲 Air Cond 🗏 Booster Seat 🗐 Care Plan 📄 Car seat as age/size appropriate 📄 Nurse 💭 Oxygen |
| Safety Vest Seatbelt Service Animal Wheelchair Walker Tinted Windows                             |
| District Field    Transportation Status:   |
| Address: Zip Code: Use Geofence Exclude Transpass  |
| Attachment Type: All   |
| Tind Clear Filters Clear Results Curb to Curb Stop New Student Bulk Update Assign Symbols ADA    |
| Show all run revisions with student details.   |

## **CREATING STOPS**

## **Understanding Stops**

As it is explained in the introductory tutorial *Get to Know Compass*, Stops are those places where Students will be picked up or dropped off on their way to or back from school. Users need to plan Stops carefully before they can generate Runs and Routes, since they will determine the course of these.

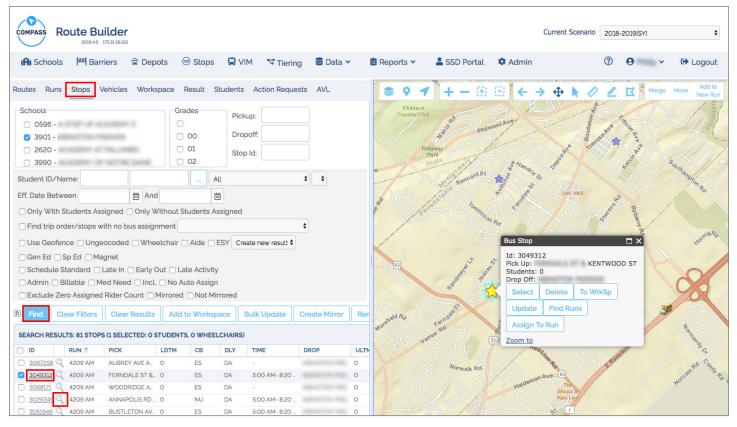
Compass contemplates two types of residential bus Stops (those different from Schools), depending on the number of Students assigned to them:

- There are Stops that service only one Student. Sometimes these are created next to the Student's residence and they are known as Curb-To-Curb Stops.
- There are also Group Stops, which can service several Students that live nearby and are able to walk to them.

#### **Stop Management Tool**

The Stop Management tool can be accessed by clicking on the **Stops** tab. This will display the Stops Management menu, where many different filters are available to narrow down the search of existing Stops.

Once the preferred filters have been selected, clicking on the **Find** button located underneath will return a list of the matching Stops. This list shows the Stop ID followed by a **Search** button that can be clicked to disclose the selected Stop on the map together with its Bus Stop location window.



The Bus Stop location window shows Stop ID, Pick Up and Drop Off locations linked to the Stop, and several buttons users may use to:

- Select the Stop
- Delete the Stop
- Add the Stop to the Workspace
- Update the Stop's information
- Find Runs
- Assign to Runs

A quick **Zoom To** button is also available to get a closer view of the location on the Map.

| No.                 | Bus Stop   | 7ALP    | NX P     | N Rd X |
|---------------------|--|---------|----------|--------|
| the share           | Id: 304931<br>Pick Up:<br>Students:<br>Drop Off: | 2       | KENTWO   | OD ST  |
| $\Delta \mathbf{z}$ | Select   | Delete  | To WrkSp |        |
|                     | Update   | Find Ru | ins      | 3      |
| Susan               | Assign T   | o Run   |          |        |
| 532                 | Zoom to  |         |          | A      |

#### A Closer Look at the Filters

| - Schools<br>○ 0596 -<br>☑ 3901 -<br>○ 2620 -<br>○ 3990 -  | Grades<br>0 00<br>0 1<br>0 2 | Pickup: a Dropoff: b       |
|--|------------------------------|----------------------------|
| Student ID/Name:   | And All                      | ¢ ¢ C                      |
| Find trip order/stops with no bus as     Use Geofence      Ungeocoded                                  | signment                     | ¢<br>Y Create new result ♦ |
| Gen Ed Sp Ed Magnet  Schedule Standard Late In Ea  Admin Billable Med Need  Czero Assigned Rider Count | ncl. 🗌 No Auto Assign        | red                        |

More alternatives displayed below (d) include:

- Stops with/without Students assigned.
- · Geofenced Stops (located within an area previously delimited by a polygon).
- Ungeocoded Stops.

To know more about this topic, read the Geocoding section.

- Stops with aides assigned.
- Stops for General Education, Special Education or Magnet programs.
- Different types of schedule.
- Administrative, Billable and Medical Needs classification.

The first two sets of filters are **Schools** and **Grades** (a) and they are displayed within separate sections.

Next to them, three new text boxes allow users to filter by **Pickup**, **Drop-off** or **Stop ID** (b).

Pick up and Drop-off allow the input of the address where this actions take place, or even just the street names at such locations. This also applies to intersections.

Located underneath, **Student ID** or **Name**, **Avail-able Schools** (c) and a drop-down menu that presents additional specifications also provide filtering options.

#### **Other Stop Related Buttons**

In addition to Find and Clear, several other buttons are displayed under the search filters area.

| Schools                                      | Grades               | Pickup:              |               |        |          |        |                  |        |                 |     |
|--|----------------------|----------------------|---------------|--------|----------|--------|------------------|--------|-----------------|-----|
| 0596 -                                       |                      |                      |               |        |          |        |                  |        |                 |     |
| 3901 -                                       | 00 0                 | Dropoff:             |               |        |          |        |                  |        |                 |     |
| □ 2620 -                                     | 01                   | Stop Id:             |               |        |          |        |                  |        |                 |     |
| 3990 -                                       | 02                   |                      |               |        |          |        |                  |        |                 |     |
| Student ID/Name:                             | All                  |                      | •             |        |          |        |                  |        |                 |     |
| Eff. Date Between                            | <b></b>              |                      |               |        |          |        |                  |        |                 |     |
| Only With Students Assigned Only With        | nout Students Assign | ed                   |               |        |          |        |                  |        |                 |     |
| □ Find trip order/stops with no bus assignme | ent                  |                      | \$            |        |          |        |                  |        |                 |     |
| Use Geofence Ungeocoded Wheeld               | hair 🗆 Aide 🗆 ESY    | Create new result \$ |               |        |          |        |                  |        |                 |     |
| 🗆 Gen Ed 🗆 Sp Ed 🗆 Magnet                    |                      |                      |               |        |          |        |                  |        |                 |     |
| 🗆 Schedule Standard 🗆 Late In 🗆 Early Out    | Late Activity        |                      |               |        |          |        |                  |        |                 |     |
| 🗆 Admin 🗆 Billable 🗆 Med Need 🗆 Incl. 🗆      | No Auto Assign       |                      |               |        |          |        |                  |        |                 |     |
| Exclude Zero Assigned Rider Count      Mir   | rored 🗌 Not Mirrore  | d                    |               |        |          |        |                  |        |                 |     |
| Find Clear Filters Clear Results             | Add to Workspace     | Bulk Update          | Create Mirror | Domour | e Mirror | Svc. T | ime New          | Delete | Groups          |     |
| Clear Fillers Clear Results                  | Add to workspace     | Buik Opdate          | Create Mirror | Remove | e Mirror | SVC. I | ime New          | Detete | Groups          | ols |
| SEARCH RESULTS: 81 STOPS (1 SELECTED: 0 STU  | DENTS, O WHEELCHA    | IRS)                 |               |        |          |        |                  |        |                 |     |
| DID RUN 🗘 PICK LI                            | DTM CB DLY           | Y TIME               | DROP          | ULTM   | СВ       | DLY    | TIME             | TRTM   | ASSIGNED RIDERS | wc  |
| □ <u>3067258</u>                             | ES DA                | -                    |               | 0      | ES       | DA     | 7:50 AM- 7:55 A  |        | 1               | 0   |
| ✓ <u>3049312</u><br>4209 AM FERNDALE ST & 0  | ES DA                | 5:00 AM- 8:20        |               | 0      | ES       | DA     | 8:25 AM- 8:30 A. |        | 0               | 0   |
| □ <u>3068171</u>                             | ES DA                | -                    |               | 0      | ES       | DA     | 7:50 AM- 7:55 A  |        | 1               | 0   |

These buttons include:

- Add to Workspace: Stops can be added to the Workspace when they are going to be used to generate a Run.
- Bulk Update: Used to apply an action to a set of selected Stops.
- Create and Remove Mirror: Mirroring Stops is the process of turning AM Stops into PM Stops to generate Reverse Runs.
- New: Users can always create New Stops by clicking this button.
- **Delete**: Selected Stops can be deleted by clicking the Delete button.
- Groups: Used to group Stops together under specific names.
- Symbols: Used to create and assign symbols.

#### **Stop Tabs**

Remember that after a Stop search is done, a table showing a list of the matching Stops is displayed under the filter sections.

If you click on any Stop ID, a new window containing the information related to that specific Stop will appear. This information is distributed in several menus under different tabs.

The first two tabs are called Pick Up and Drop Off. It is fundamental to understand that every Stop must be linked to a Pick Up location and a Drop Off location when it is created, since every Student picked up at a particular Stop is necessarily dropped off at another.

Generally, one of these two locations will be the Student's residence (or a location close to it) and the other one will be the School. Then, if an existing Stop shows a specific address as a Pick Up location, the Drop Off location will generally be a School and vice versa. Let's take a closer look at these tabs with the help of some illustrations:

#### Pick Up

1

Stop Address or School can be selected at the top of the dialog. Related fields display to allow the input of relevant information.

The lower half of this menu also allows users to:

- Input Pick Up time window, Assigned and Actual number of Riders, number of Wheel Chairs, Safe Vests and Seat Belts, and Load Time in minutes.
- Select Curb location. This drop-down menu specifies if U-Turns are allowed at this Stop and which side of the street the vehicle will be approaching from.
- Select Delay type. The Soft/Hard Time window drop-down menu is used to indicate if the scheduled time for the bus to reach the Stop is flexible or not. For example, Hard Time Window must be necessarily assigned to Schools because the arrival of the bus is determined by the Bell Time.
- Enter Maximum Ride Time in minutes.
- Select Specialties
- · Add Notes as needed.

| EXISTING STOP   | 3                          |
|---|----------------------------|
| Stop Id: 2311837 Alter  | rnate Stop #:              |
| Pick Up Drop Off Date/Class S   | top Students Find Students |
| Stop Address     School     Address     NE 30TH AVE@NE 115TH CI     Area:     Apt/Bidg:     Street 1:     Street 2     X:     -13652290.4118     Y:     57. |                            |
| Pick Up Between:  | and:                       |
| Curb: Right side of vehicle   | Specialties                |
| Max Ride Time Min.  | Boys •                     |
| Notes:  | 1                          |
| ok close  |                            |

| EXISTING STOP                            |                                  |                     |   |
|--|----------------------------------|---------------------|---|
| Stop Id: 2311837<br>Pick Up Drop Off Dat | Alternate S<br>te/Class Stop Stu |                     |   |
| Stop Address                             | School<br>City                   | State Zip           | _ |
| Area:<br>Street 1:                       | Apt/Bldg:                        | Corner:             |   |
| X:                                       | Y:                               | <b>8</b> 2 <b>8</b> |   |
| Drop Off Between:<br>Unload Time<br>Min  | 8:00 AM and                      | 8:05 AM             |   |
| Curb: Right side of Delays: Hard Time    |                                  |                     |   |
| Notes:                                   |                                  | 1                   |   |
| ok close                                 |                                  |                     |   |

#### Drop Off

7

The Drop Off Menu is very similar to the Pick Up Menu and, again, Stop Address or School can be selected at the top of the dialog, and related information input in the provided text boxes.

The lower half of this menu allows users to:

- Enter Drop Off time window and Unload Time in minutes.
- Select Curb location. Remember this drop-down menu specifies if U-Turns are allowed at this Stop and which side of the street the vehicle will be approaching from.
- Select Delay type. Remember that the Soft/Hard Time window drop-down menu is used to indicate if the scheduled time for the bus to reach the Stop is flexible or not.
- Add Notes as needed.

3

4

#### Stop Students Tab

The Stop Students tab displays a list of the Students that have been assigned to that Stop.

Each row shows Student ID, full Name, Address, School and Stop Effective Date.

Students can be selected and Removed whenever it is necessary.

In order to avoid mistakes, notice that Stop ID and Student ID are different.

| udents          |  |   |  |  |   |  |   |  |
|-----------------|--|---|--|--|---|--|---|--|
|                 | Remove All   |   |  |  |   |  |   |  |
| ENTS (5)        |  |   |  |  |   |  |   |  |
| STUDENT ID      | ALT. STUDENT ID  | LAST  | FIRST  | ADDRESS  | SCHOOL  | GRADE  | EFF. DATE   | END DATE   |
| C0008363        | T178434  | PRESCOTT  |  |  |   | 08   | 6/1/2018  |  |
| <u>C0042597</u> |  | Prescott  |  |  |   | 04   | 6/1/2018  | 8/23/2018  |
| <u>C0047436</u> |  | Glover  |  |  |   | 05   | 6/1/2018  | 8/23/2018  |
| <u>C0047360</u> |  | Abbott  |  |  |   | 08   | 5/13/2019   |  |
| C0008361        | T178432  | GLOVER  |  |  |   | 06   | 6/1/2018  | 8/23/2018  |
|                 |  |   |  |  |   |  |   |  |
|                 |  |   |  |  |   |  |   |  |
|                 | STUDENT ID<br>CO008363<br>CO042597<br>CO047436<br>CO047360 | ALT. STUDENT ID         ALT. STUDENT ID           00008363         T178434           00042597         0           00047436         0           00047360         0 | STUDENTID         ALT.STUDENTID         LAST           COO08303         T178434         PRESCOTT           COO42597         Prescott           COO47430         Glover           COO47350         Abbott | STUDENTID         ALT. STUDENTID         LAST         FIRST           C0008303         T178434         PRESCOTT            C0042597         Prescott            C0047430         Glover            C0047350         Abbott | STUDENT ID         ALT. STUDENT ID         LAST         FIRST         ADDRESS           C0008363         T178434         PRESCOTT | STUDENTID         ALT. STUDENTID         LAST         FIRST         ADDRESS         SCHOOL           C0008363         T178434         PRESCOTT | ALT. STUDENT ID         LAST         FIRST         ADDRESS         SCHOOL         GRADE           C00042597         17/8434         PRESCOTT         08         04         04         04         04         05         05         05         08         08         05         05         05         05         08         08         08         08         05         05         05         05         06         08         08         08         08         08         05         05         05         06         08 | STUDENT ID         ALT. STUDENT ID         LAST         FIRST         ADDRESS         SCHOOL         GRADE         EFF. DATE           C0008363         T178434         PRESCOTT         08         6/1/2018           C00425697         Prescott         04         6/1/2018           C0047436         Glover         05         6/1/2018           C0047360         Abbott         08         5/13/2019 |

## NOTE: Stop ID vs Student ID

In order to avoid mistakes, be aware that Stop ID and Student ID are different.

#### Find Students Tab

This Menu allows users to search Students by ID, Last Name, First Name, Schools, Grade and Walk Distance in order to assign such Students to the Stop.

The resulting Students can be listed in the Student Search Result table and/or disclosed on the Map as preferred.

Then, any matching Student can be selected and added to the Stop by clicking on the **Add to Stop** button.

Effective and End dates can also be specified.

| FING STOP  |   |             |              |                  |                   |                               |
|--|---|-------------|--------------|------------------|-------------------|-------------------------------|
| Id: 3031960  |   |             |              |                  | Alternate Stop #: | 2942486                       |
| Up Drop Off  | Date/Class St                                 | op Students | Find Student | s                | -                 |                               |
| dent ID:   |   | 5996        |              | AC ADDRESS       | <b>^</b>          | A Walk to St                  |
| t Name:  |   | 0596        |              | ACADEMY 2        | 00                | Miles 0.5                     |
| t Name.  |   | ✓ 3901      | -            | PRODUCTS.        | 01                | Search for                    |
| st Name:   |   | <b>5920</b> | -            | LARGE HERE BOARD | 02                | Students at<br>• Drop Off     |
| ective Date:   | Map Tabl                                      | End D       | oate: 5/31/2 | 2019             |                   | Find                          |
| ective Date:<br>UDENT SEARC  | 5/24/2019                                     | End D       | pate: 5/31/2 | ADDRESS          | SCHOOL            | GRADE                         |
| ective Date:<br>UDENT SEARC  | 5/24/2019<br>H RESULT (232)                   | End D       | 5/31/2       |                  | SCHOOL            | 7                             |
| UDENT SEARC  | 5/24/2019<br>H RESULT (232)                   | End D       | 5/31/2       |                  | SCHOOL            | GRADE                         |
| ective Date:<br>UDENT SEARC<br>STUDENT                                   | 5/24/2019<br>H RESULT (232)<br>D ALT. STUDENT | End D       | 5/31/2       |                  | SCHOOL            | GRADE<br>01                   |
| UDENT SEARC<br>STUDENT<br>COO57319<br>COO46746                           | 5/24/2019<br>H RESULT (232)<br>D ALT. STUDENT | End D       | 5/31/2       |                  | SCHOOL            | GRADE<br>01<br>02             |
| UDENT SEARC<br>STUDENT I<br>COO57319<br>COO46746<br>COO4860C             | 5/24/2019<br>H RESULT (232)<br>D ALT. STUDENT | End D       | 5/31/2       |                  | SCHOOL            | GRADE<br>01<br>02<br>02       |
| UDENT SEARC<br>STUDENT I<br>CO057319<br>CO046746<br>CO04860C<br>CO039825 | 5/24/2019<br>H RESULT (232)<br>D ALT. STUDENT | End D       | 5/31/2       |                  | SCHOOL            | GRADE<br>01<br>02<br>02<br>11 |

## Adding Stops in the Map

There are two main ways to create new Stops in Compass. The simplest method involves Adding Stops directly in the Map.

To Add a Stop in the Map,

- Find the location where you want the Stop to be placed.
- Right click on it and select **Add Stop** in the displayed list of actions. A **New Stop** window will appear. Remember that Stops must have Pick Up and Drop Off information associated.

### TO SCHOOL

If you want to create an **AM Pick Up Stop** at a particular address (going to School in the morning), you need to start by selecting Stop Address (not School) in the Pick Up dialog.

However, notice that Stop Address is shown by default when creating a new Stop, and the Address information is provided in the corresponding fields.

#### Within the Pick Up tab:

- Input Pick Up Time Window limits.
- If required, you can manually enter the number of Riders, and Students using Wheel Chairs, Safe Vests or Seat Belts. This information will be updated and shown in the corresponding text boxes if Students with such requirements are assigned to the Stop.
- Enter Load Time in minutes.
- Select Curb location.
- Select the allowed type of Delays, i.e., Hard or Soft Time Window.
- Enter Maximum Ride Time in minutes.
- Select Aide, AC or other Specialties if required.
- Type in any required Notes.

| IEW STOP   |  | X X Z X Merge Move Add to<br>New Rt   |
|--|--|---|
|  | ernate Stop #:                                     | NE 124th St   |
| • Stop Address • School  |  |   |
| Address<br>5851 NE 119th St  | City State Zip                                     | Zasan in final tha  |
| Area: • Apt/Bldg   | :  | Zoom in, find the<br>location, right click  |
| Street 1: Street   | 2: Corner:   | on it and select Add<br>Stop  |
| X: -13649146.6402 Y: 5<br>Pick Up Between: Assigned Actual Rider                                 | 733625.870810 🕷 😒 🐝<br>and:<br>sWC SV SB Load Time |   |
| Riders   | 0 0 0 1 Min  | 8 NE 118th St   |
| Curb: Either side of vehicle Delays: Soft Time Window Max Ride Time Min. Notes: Add to Workspace | Specialties AC Aide Boys                           | NE 115in 51<br>Ventor 115in 51<br>Ventor 115in 51<br>Ventor 115in 51<br>Ventor 115in 51<br>Ventor 114in 51<br>Ventor 114in 51 |

## NOTE: Number of Riders

Be aware that, if no Students have been assigned to the Stop, the number of riders in the corresponding text box must be 0. Otherwise, a warning message will pop-up and the information won't be saved.

2

Once completed, move on to the **Drop Off** tab by clicking on it and:

- Click on the School selection button.
- Select the School in the drop-down menu located under the School selection button.
- If needed, select the Bell Time from the available drop-down menu.
- Enter the Drop Off Time Window limits in the corresponding text boxes.
- Enter expected Unload Time in minutes.
- Select Curb Specifications and Delay type (Hard or Soft Time Window).
- Type in any Notes and click OK below to save the Stop.

| NEW STOP   | X X X Merge Move Add to New Run   |
|--|---|
| Stop Id: Alternate Stop #:<br>Pick Up Drop Off Dye/Class Stop Students Find Students | NE 124th St   |
| Stop Address School  |   |
| Bell Times (To-School) AM IN BELL TIME: 8:30 , V                                     |   |
|  |   |
| Drop Off Between: 8:10 AM and: 8:20 AM<br>Unload Time<br>Min                         | NE 119th  |
| Curb: Right side of vehicle   Delays: Hard Time Window   Notes:                      | 2<br>m<br>9<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7<br>7 |
| Add to Workspace   | NE 115th St   |
| ok close   | NE 114th St   |
| 별 불<br>Sources: Esri, HERE, Garmin, USGS, II   | NE 112th St<br>Thermap, INCREMENT P, NRCan, Esri Japan  |

#### FROM SCHOOL

If you want to create a Stop for a **PM Drop Off Stop** (generally at the Student's address) the method will follow opposite Steps:

Within the Pick Up tab:

- Click the School selection button.
- Select the School in the drop-down menu under the School selection button.
- Choose Bell Time in the available drop-down menu (Generally PM Out for School Pick Up).
- Enter Pick Up Time Window limits in the corresponding text boxes.
- If required, you can manually enter the number of Riders and Students using Wheel Chairs, Safe Vests or Seat Belts. This information is updated and shown in the corresponding text boxes if Students with such requirements are assigned to the Stop.
- Enter Load Time in minutes.
- Select Curb Specifications.
- Select Delay type (Hard or Soft Time Window).
- Input Maximum Ride Time in minutes.
- Select other required Specialties.
- Type in any additional Notes.

| NEW STOP             |                 |                    |           | ×     |        | er e    |        | Merge    | Move        | New Ru     |
|----------------------|-----------------|--------------------|-----------|-------|--------|---------|--------|----------|-------------|------------|
| Stop Id:             | Alternate       | Stop #:            |           |       |        |         |        |          |             |            |
| Pick Up Dro Off Dat  | e/Class Stop St | udents Find Stu    | idents    | _     |        |         |        | NE 124th | St          |            |
| Stop Address 🖲       | School 🔶        |                    |           |       |        |         |        |          |             |            |
| 110 ·                |                 | • 🔶                |           |       |        |         |        |          |             |            |
| Bell Times (From-S   | School) PM OUT  | BELL TIME: 1       | ] ◀—      |       |        |         |        |          |             |            |
|                      |                 |                    |           |       |        |         |        |          |             |            |
|                      |                 |                    |           |       |        |         |        |          |             |            |
|                      |                 |                    |           |       |        |         |        |          |             |            |
|                      |                 |                    |           |       |        |         |        |          |             |            |
| Pick Up Between:     | 2:58 PM and     | 1: 3:03 PM         |           |       |        |         | 0      |          | e,          | NE 1       |
|                      | ual Riders WC   | SV SB              | Load Time |       | Ave    |         |        |          | NE 60th Ave |            |
| Riders               |                 |                    |           |       | 10     | E 118th | St     |          | NE 6        |            |
| 0                    | 0               | O O<br>Specialties | 1 Min     |       | NE     |         |        |          |             |            |
| Curb: Either side of | vehicle 🔻       | AC                 |           |       |        |         |        |          |             |            |
| Delays: Soft Time \  | Window 🔻        | Aide               |           |       | VE 50  | NE 11   | 6th St |          |             |            |
| Max Ride Time Min.   |                 | Boys               | -         |       | th N   | NE 11   |        |          |             | NE 61st PI |
| Notes:               |                 |                    |           |       | 0      | NE 1151 | n St   |          |             | NE 61      |
| Notes:               |                 |                    | 11        |       |        | Ave     |        | NE 114th |             |            |
|                      |                 |                    |           |       |        | 57th    |        | NE 1140  | 51          |            |
| Add to Workspace     |                 |                    |           |       |        | NE 1131 | h St   |          |             |            |
| ok close             |                 |                    |           |       |        |         |        |          |             |            |
|                      | Courses         | Esri, HERE, Gar    |           | tores | an INI | DEMEN   | NE     | 112th St |             | es         |

## NOTE: Number of Riders

Remember that, if no Students have been assigned to the Stop, the number of riders in the corresponding text box must be 0. Otherwise, a warning message will pop-up and the information won't be saved.

2

Once completed, move on to the **Drop Off** tab by clicking on it and:

- Click on the Stop Address selection button.
- Input Drop Off Time Window limits.
- Enter Unload Time in minutes.
- Select AC requirements if needed.
- Select Curb Specifications
- Select type of Delay (hard or soft Time Window).
- Type in any required Notes.
- Click OK to save the newly created Stop.

| NEW STOP                      |                                | ×  |               | Merge Move Add to<br>New Rur |
|-------------------------------|--------------------------------|----|---------------|------------------------------|
| Stop Id: Alter                | nate Stop #:                   |    |               | NE 124th St                  |
| Stop Address     School       | op otadenta Tina otadenta      |    |               |                              |
| Address                       | City State Zip                 |    |               |                              |
| 5851 NE 119th St              | Vancouver WA *                 |    |               |                              |
| Area: • Apt/Bldg:             |                                |    |               |                              |
| Street 1: Street 2:           | Corner:                        | _  |               |                              |
|                               |                                |    |               |                              |
| X: -13649146.6402 Y: 573      | 3625.870810 😻 🔍 😻              |    |               |                              |
| Drop Off Between:             | and:                           |    |               | NE 11                        |
|                               | anu:                           |    | Ave           | NE 60th Ave                  |
| Unload Time                   |                                |    | NE 118th St   | 60th                         |
|                               |                                |    | NE 5          | Ξ.                           |
| Curb: Right side of vehicle 🔻 |                                |    |               |                              |
| Delays: Soft Time Window      |                                |    | z             |                              |
|                               |                                | -  | NE 5 NE 116th |                              |
| Notes:                        | /                              |    | NE 115th St   | NE 61st P                    |
|                               |                                |    |               | Z                            |
| Add to Workspace              |                                |    | 57th Ave      | NE 114th St                  |
| ok close                      |                                |    | iii ii        |                              |
|                               |                                |    | NE 113th S    | t=                           |
|                               | u u                            | N. |               | NE 112th St                  |
| Sol                           | urces: Esri, HERE, Garmin, USC |    | , INCREMENT F | NRCan, Esri Japan - CS       |

When you click on the Map to create a new Stop, the New Stop window displays an address with its associated geographic coordinates (X and Y values). If you have read the Geocoding section, you may remember that even an actual address already existing in the database can't be found in the Map sometimes. This often happens because it takes some time to update the map's information after recent developments. Then, the system might be able to geolocate the address and assign coordinates to it, but no graphic information of the current street layout would be displayed.

If you want to know more about this topic, read the <u>Geocoding</u> section.

### **Creating Stops for Returning Runs: Mirroring**

If you have completed AM Stops, you can always use the Create Mirror Tool to create PM Stops so that Students can be picked up at School and returned to their residences following reverse Runs.

Mirroring is a quick way to turn AM Stops into PM Stops, specially when multiple Stops need to be included in the process.

To learn about Mirroring, read the tutorial *Mirroring Stops*.

## Adding Stops with the New Stop Button

A different method to Add Stops during route building with Compass involves the use of the New Stop window. To do so:

- · Click the Stops tab (1) first to operate the Stops Management tool.
- Click the New button (2). The New Stop window appears.

Identically to what happens when creating a New Stop in the Map, the New Stop window shows **Pick Up** and a **Drop Off** dialogs under separate tabs. Remember that every Stop needs to be associated to Pick Up and Drop Off information, since Students need to be Picked Up and Dropped Off at different locations, generally their residence and the School.

| COMPASS Route Builder<br>201940 1723156152  | 9  |                           |                     |                       |  |
|---|--|---------------------------|---------------------|-----------------------|--|
| 🕅 Schools 🚧 Barriers 🎓 Depots   | 🐵 Stops 🛛 VIM 😋 Ti   | ering 🛢 Data 🗸 📋 Repor    | ts 🗸 🔹 💄 SSD Portal | 🏟 Admin               |  |
| Routes Runs Stops Vehicles Workspac   | e Result Students Action Re  | quests                    |                     |                       |  |
| Schools     Check All Schools     230 - 230     2620 - 2620     5996 - 5996     ✓   | Grades         Pickup:           01         Dropoff:           02         Stop Id: |                           |                     |                       |  |
| Student ID/Name:  | All  | •                         |                     |                       |  |
| Find trip order/stops with no bus assignme     Use Geofence Ungeocoded Wheelch  | nt   | ▼<br>ult ▼                |                     |                       |  |
| Gen Ed Sp Ed Magnet Schedule Standard Late In Early Out Late Activity Admin Billable Med Need IncL No Auto Assign Exclude Zero Assigned Rider Count Mirrored Not Mirrored |  |                           |                     |                       |  |
| Find Clear Filters Clear Results  | Add to Workspace Bulk Update   | Create Mirror Remove Mirr | or Svc. Time New    | Delete Groups Symbols |  |

#### TO SCHOOL

If you want to create an **AM Pick Up Stop** at a particular address (going to School in the morning), you need to start by selecting Stop Address (not School) in the Pick Up dialog. However, notice that Stop Address is shown by default when creating a Stop.

When the New Stop window is displayed, in the Pick Up dialog:

- Input Stop Address details.
- Disclose the associated coordinates (Geocoding) with the Coordinates Tool. To learn about this topic, read the <u>Geocoding</u> section.

Below:

- Enter Pick Up Time Window limits.
- If required, you can manually enter the number of Riders and Students using Wheel Chairs, Safe Vests or Seat Belts. This information is updated and shown in the corresponding text boxes if new Students with such requirements are assigned to the Stop.
- Input Load Time in minutes.
- Select Curb Specifications and Type of Delay (hard or soft Time Window).
- · Select Aide, AC requirements or other available Specialties if necessary.
- Enter Maximum Ride Time in minutes.
- Type in any required Notes.

| NEW STOP                     | E                           |
|------------------------------|-----------------------------|
| Stop Id: Alte                | ernate Stop #:              |
| Pick Up Drop Off Date/Class  | Stop Students Find Students |
| Stop Address School Address  | City State Zip              |
| Area: • Apt/Bldg             |                             |
| Street 1: Street 2           |                             |
| X: Y:                        | <b>( ( ( ( ( ( ( ( ( (</b>  |
| Pick Up Between:             | and:<br>sWC SV SB Load Time |
| Riders                       | 1 Min                       |
| Curb: Either side of vehicle | Specialties     AC          |
| Delays: Soft Time Window     | Aide                        |
| Max Ride Time Min.           | Boys -                      |
|                              |                             |
| Notes:                       | <i>k</i>                    |
| Add to Workspace             | <i>h</i>                    |

## NOTE: Number of Riders

Remember that, if no Students have been assigned to the Stop, the number of riders in the corresponding text box must be 0. Otherwise, a warning message will pop-up and the information won't be saved.

Once completed, move on to the **Drop Off** tab by clicking on it and select School. Then:

- Select the School in the drop-down menu located under the School selection button.
- Select the Bell Time from the available drop-down menu.

Below:

- Enter the Drop Off Time Window limits in the corresponding text boxes.
- Enter expected Unload Time.
- · Select Aide, AC requirements or other available Specialties if necessary.
- Select Curb Specifications and Delay type (usually hard Time Window).
- Type in any required Notes.
- At the bottom of the window Click OK to save the New Stop.

| NEW STOP  | × |
|---|---|
| Stop Id: Alternate Stop #:<br>Pick Up Drop Off Date/Class Stop Students Find Students |   |
| Stop Address School Bell Times  |   |
|   |   |
| Drop Off Between: and:  | ٦ |
| Unload Time   |   |
| Curb: Either side of vehicle 🔻  |   |
| Delays: Soft Time Window  |   |
| Notes:  |   |
| Add to Workspace  |   |

#### FROM SCHOOL

If you want to create a PM Drop Off Stop (generally at the Student's address) the method will follow opposite Steps:

Within the Pick Up tab select School. Then:

- Select the School in the drop-down menu located under the School selection button.
- Select the Bell Time from the available drop-down menu.

Below:

- Enter Pick Up Time Window limits.
- You can enter the number of Riders and Students using Wheel Chairs, Safe Vests or Seat Belts. This information is updated and shown in the corresponding text boxes if new Students with such requirements are assigned to the Stop.
- Enter Load Time in minutes.
- Select Curb Specifications.
- Select type of Delay (usually hard Time Window).
- Select Aide and AC requirements if necessary.
- Input Maximum Ride Time in minutes.
- Type in any required Notes.

| NEW STOP   |
|--|
| Stop Id: Alternate Stop #:   |
| Stop Address School  |
|  |
| Pick Up Between:       and:         Assigned       Actual Riders WC       SV       SB       Load Time         Riders       1       Min         Curb:       Either side of vehicle •       Specialties       AC         Delays:       Soft Time Window •       Aide       Boys       •         Notes: |
| Add to Workspace   |

## NOTE: Number of Riders

Remember that, if no Students have been assigned to the Stop, the number of riders in the corresponding text box must be 0. Otherwise, a warning message will pop-up and the information won't be saved.

Once completed, move on to the **Drop Off** Menu by clicking on its tab and select **Stop Address**. Then:

- Input Stop Address details.
- Disclose the associated coordinates (Geocoding) with the Coordinates Tool.
  - To learn more about this topic, read the <u>Geocoding</u> section.

Below:

7

- Input Drop Off Time Window limits.
- Enter Unload Time in minutes.
- Select Curb Specifications
- Select type of Delay (usually soft Time Window).
- Type in any required Notes.
- Click OK to save the newly created Stop.

| NEW STOP            |                        | ×             |
|---------------------|------------------------|---------------|
| Stop Id:            | Alternate Stop #       | ¥:            |
| Pick Up Drop Off Da | te/Class Stop Students | Find Students |
| Stop Address        |                        |               |
| Address             | City                   | State Zip     |
| Area:               | Apt/Bldg:              |               |
| Street 1:           | Street 2:              | Corner:       |
|                     |                        |               |
| X:                  | Y:                     | ۵۶ 🖉 🖉        |
| Drop Off Between:   | and:                   |               |
| Unload Time         |                        |               |
| Min                 |                        |               |
| Curb: Either side o | fvehicle 🔻             |               |
| Delays: Soft Time   | Window 🔻               |               |
| Notes:              |                        |               |
|                     |                        | //            |
| Add to Workspace    | 9                      |               |
| ok close            |                        |               |

When you create a new Stop, the New Stop window displays an address with its associated geographic coordinates (X and Y values). However, sometimes an actual address at that specific location might not exist in the database. This often happens because it takes some time to update the map's information after recent developments. In that case, the system might be able to geolocate the address and assign coordinates to it (Geocoding), but the current street layout wouldn't be displayed.

If you want to review this concept, click and read the <u>Geocoding</u> section.

### **Creating Stops for Returning Runs: Mirroring**

If you have completed AM Stops, you can always use the Create Mirror Tool to create PM Stops so that Students can be picked up at School and returned to their residences following reverse Runs.

Mirroring is a quick way to turn AM Stops into PM Stops, specially when multiple Stops need to be included in the process.

To learn about Mirroring, read the tutorial Mirroring Stops.

## Geocoding

Remember that **Geocoding** is the process of transforming a specific address to a pair of geographic coordinates (X and Y values). Some common tasks in Compass Route Builder, such as adding new Students, adding new Schools, or creating Stops, require that addresses are converted into coordinates. Compass uses these coordinates to produce Runs and Routes and the **Coordinates Tool** can help users to disclose X and Y values associated with an address or point in the Map.

There are three different tools available for Geocoding next to the address text box: The red button is used to disclose address and coordinates, the green button can be used to disclose coordinates only and the white one links an address to associated coordinates.

- 1 If you know the exact location on the map, you can disclose the address and coordinates at the same time with the red Geocoding button as follows:
  - Click first the red Geocoding button.
  - Zoom in and click on the exact location on the map. The address and coordinates will be displayed in the corresponding text boxes.

| 2 | The green geocoding button gives the user the option to enter |
|---|---|
|   | the address manually and even customize the way such ad-      |
|   | dress is displayed. To do so:                                 |

- Click the green Geocoding button.
- Zoom in and click on the exact location on the map. The coordinates associated with that location will be disclosed in the corresponding text boxes.
- Then, enter the address information as you want it to be displayed in the address text box.

| Stop Id: Alternate Stop #:<br>Pick Up Drop Off Date/Class Stop Students Find Students<br>Stop Address School<br>Address City State Zip<br>2001 NE Parkview Dr Vancouver 98686<br>Area: Apt/Bldg:<br>Street 1: Street 2: Corner:<br>X: -136534056159 Y: 57330573704121<br>Pick Up Between: and: Click<br>Assigned Actual WC SV SB Load<br>Riders Riders 1 Min<br>Curb: Either side of vehicle Specialties   | NEW STOP  | × Annak ( |
|--|---|-----------|
| Stop Address © School Address City State Zip 2001 NE Parkview Dr Vancouver ♥ 98686 Area: • Apt/Bldg: Street 1: Street 2: Corner: * 136534056159 Y: 57330573704121 Pick Up Between: and: Click Assigned Actual WC SV SB Load Riders 1 mine Click Delays: Soft Time Window • Aide Boys Max Ride Time Min. Notes: Add to Workspace  | Stop Id: Alternate Stop #:                              | E HIB     |
| Address City State Zip<br>2001 NE Parkview Dr Vancouver 98686<br>Area: Apt/Bldg:<br>Street 1: Street 2: Corner:<br>X: -136534056159 Y: 57330573704121<br>Pick Up Between: and: Click<br>Assigned Actual WC SV SB Load<br>Riders Riders 1 Min<br>Curb: Either side of vehicle V Specialties<br>Add to Workspace   | Pick Up Drop Off Date/Class Stop Students Find Students |           |
| 2001 NE Parkview Dr   Vancouver   98686   Area:   Apt/Bldg:   Street 1:   Street 2:   Corner:   X:   136534056159   Y:   57330573704121   Pick Up Between:   and:   Click   Assigned   Actual   WC   System   Image:   Image:   Victor   Either side of vehicle   Aide   Boys   Max Ride Time Min.   Notes:  | Stop Address School                                     |           |
| Area:  Apt/Bldg:  Street 1: Street 2: Corner:  X: -13653405 6159 Y: 57330573704124  Pick Up Between: and:  Click  Assigned Actual WC SV SB Load  Riders Riders  Actual WC SV SB Load  Time  Delays: Soft Time Window  Max Ride Time Min.  Notes:  Add to Workspace   | Address City State Zip                                  |           |
| Area:  Apt/Bldg:  Street 1: Street 2: Corner:  X: -13653405 6159 Y: 57330573704124  Pick Up Between: and:  Click  Assigned Actual WC SV SB Load  Riders Riders  Actual WC SV SB Load  Time  Delays: Soft Time Window  Max Ride Time Min.  Notes:  Add to Workspace   | 2001 NE Parkview Dr Vancouver • 98686                   | Click     |
| X: -13653405.6159 Y: 5733057.3704121   Pick Up Between: and: Click   Assigned Actual WC SV   Riders Riders 1   Max Ride fine Window Aide   Max Ride Time Min. Boys   Notes: Add to Workspace   | Area: • Apt/Bldg:                                       |           |
| X: -13653405.6159 Y: 5733057.3704121   Pick Up Between: and: Click   Assigned Actual WC SV   Riders I Min   Curb: Either side of vehicle Specialties   Ac Aide Aide   Delays: Soft Time Window   Max Ride Time Min. Boys   Notes: Add to Workspace   | Street 1: Street 2: Corner:                             |           |
| Pick Up Between:       and:       Click         Assigned       Actual       WC       SV       SB       Load         Riders       Riders       I       Min         Curb:       Either side of vehicle       Image: Soft Time Window       Aide       Image: Soft Time Window       Image: |   |           |
| Pick Up Between:       and:       Click         Assigned       Actual       WC       SV       SB       Load         Riders       Riders       I       Min         Curb:       Either side of vehicle       Image: Soft Time Window       Aide       Image: Soft Time Window       Image: |   |           |
| Assigned Actual WC SV SB Load<br>Riders Riders Time<br>Curb: Either side of vehicle<br>Delays: Soft Time Window<br>Max Ride Time Min.  | X15055405.0155 11. 5755057.570412.                      |           |
| Riders Riders   Riders Time   1 Min   Curb: Either side of vehicle   Either side of vehicle AC   Add Add   Notes: Add  | Pick Up Between: and: Click                             |           |
| Curb: Either side of vehicle   |   |           |
| Curb: Either side of vehicle   Curb: Either side of vehicle   AC  AC  Aide  Boys  Adde to Workspace  Add to Workspace  |   |           |
| Add to Workspace   |   |           |
| Delays: Soft Time Window  Aide Max Ride Time Min. Notes: Add to Workspace  | Curb: Either side of vehicle                            |           |
| Max Ride Time Min. Boys Notes: Add to Workspace  |   |           |
| Notes:   | Boys  |           |
| Add to Workspace   | Max Ride Time Min.                                      |           |
|  | Notes:  |           |
|  |   |           |
| ok close   | Add to Workspace  |           |
|  | ok close  |           |

| NEW STOP                 |                                 | ×     |
|--------------------------|---------------------------------|-------|
| Stop Id:                 | Alternate Stop #:               |       |
| Pick Up Drop Off Date/Cl | ass Stop Students Find Students | _     |
| Stop Address O Sch       | lool                            |       |
| Address                  | City State Zip                  |       |
| 9700 NE 21st Pl          | Vancouver 🔻 98665               | Click |
| Area: • Apt              | /Bldg:                          | Ollow |
|                          | 5                               | 1     |
| Street 1: St             | reet 2: Corner:                 |       |
|                          |                                 |       |
| X: -13653305.2923        | r: 5731105.8375345 👋 🔍 🦉        |       |
|                          |                                 |       |
| Drop Off Between:        | and: Click                      |       |
| Unload Time              | Click                           |       |
| Min                      |                                 |       |
| Curb: Either side of veh | icle 🔻                          |       |
| Delays: Soft Time Wind   | dow 🔻                           | Dr    |
| Solt Time wind           | 1000                            |       |
| Notes:                   |                                 |       |
|                          | //                              |       |
|                          |                                 | NE    |
| Add to Workspace         |                                 |       |
| ok close                 |                                 |       |
| P                        |                                 |       |

3 The white geocoding button, displayed as a magnifier icon, allows the user to link an address to its corresponding coordinates.

To link an address with its associated coordinates:

- Enter the address in its corresponding text boxes.
- Click the white Geocoding button. The coordinates will be disclosed below.

| Stop Id:       Alternate Stop #:         Pick Up       Drop Off       Date/Class       Stop Students         Image: Stop Address       School       State       Zip         Address       City       State       Zip         12217 NW 15th Ave       Vancouver       WA V         Area:       Apt/Bldg:       Street 1:       Street 2: |
|---|
| Stop Address  School     Address  City State Zip     12217 NW 15th Ave Vancouver WA ▼     Area: ▼ Apt/Bldg:   |
| Address     City     State     Zip       12217 NW 15th Ave     Vancouver     WA •       Area:     •     Apt/Bldg:   |
| Area: Apt/Bidg:   |
|   |
| Street 1: Street 2: Corner:   |
|   |
| X: -13657378.5119€ Y: 5734007.239612 🕷 🔍 🖏  |
| Pick Up Between: and:   |
| Assigned Actual WC SV SB Click  |
| Riders Riders   |
| Curb: Either side of vehicle  Specialties   |
| Delays: Soft Time Window  AC Aide   |
| Max Ride Time Min.  |
| Notes:  |
|   |
| Add to Workspace  |
| ok close  |

### **Disclosing Stop Locations on the Map**

| NEW STOP   | Cour   |
|--|--|
| Stop Id: Alternate Stop #:<br>Pick Up Drop Off Date/Class Stop Students Find Students<br>Stop Address School<br>Address City State Zip                             | Geocoded Address X<br>X 123<br>Address: 12217 NW 15th Ave,<br>Y accouver, WA, 98685<br>X: -13657378,511969037<br>Y: -13657378,51196<br>Y: -13657378,51196<br>Y: -1365738<br>Y: -13657378<br>Y: -1365738<br>Y: -1365778<br>Y: -1365738<br>Y: -1365778<br>Y: -1365778<br>Y: -1365 |
| X: -13657378 5119€ Y: 5734007239612<br>Pick Up Between: and: Click<br>Assigned Actual WC SV SB Click<br>Riders 1 Min<br>Curb: Either side of vehicle V Specialties | Zoom to<br>NW 122nd St<br>NW 122nd St  |
| AC<br>Delays: Soft Time Window  Aide<br>Max Ride Time Min.   | NW 13th Ave  |
| Add to Workspace   | NW 1191  |

After an actual address is entered in its text box while creating New Stops, if the user clicks on the white Geocoding button and the system recognizes its associated coordinates, a pop-up window with such address and Geocoding information will be displayed in the Map on the corresponding location.

## NOTE: Missing Street Layout

Sometimes, even an actual address already existing in the database can't be found in the Map. This often happens because it takes some time to update the map's information after recent developments. In that case, the system might be able to geolocate the address and assign coordinates to it, but no graphic information of the current street layout would be displayed.

# Creating Curb-To-Curb Stops

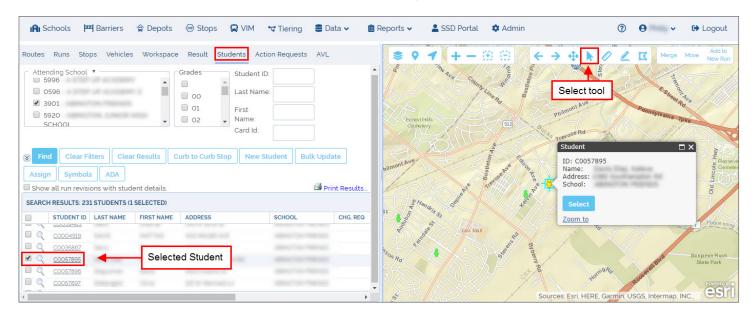
A **Curb-To-Curb Stop** has to be set by a Student's residence. In other words, it is a Stop that has the same address as the Student's home. This is often due to the Student's special needs but there might be other reasons such as the isolation of residences in rural areas.

Compass customers have the option to quickly create Curb-To-Curb Stops with the Student Management tool, instead of the Stop Management tool as it might be expected. The Student Management tool is accessed by clicking on the **Students** tab.

### **Finding and Selecting Students**

Before creating Curb-To-Curb Stops, users need to select the Students to whom such Stops will be assigned. To review how to find Students, read the tutorial *Finding Existing Students*.

Once the search is done, users can **select** the Students from the resulting search list by checking off the selection box next to their Student ID. The selected Student will be highlighted in yellow. By clicking the search icon (magnifier) in the list, or the corresponding Student icon on the map, a window showing Student's information is displayed on the Student's residence location.



Since matching Students are disclosed on the map on their residence locations, these can also be selected there with the **Select** tool. To do so:

- You might need to zoom in first to isolate the Student and make the selection easier. Use the **Zoom in** or the **Marquee Zoom In** to isolate the Student.
- Select the Student in the Search Results list or click the **Select** tool in the Map toolbar and then click on the Student.

You can select multiple Students at the same time by dragging the cursor so that you draw a rectangle that includes those Students.

The color of the icon will switch from green to yellow in the Map to indicate that the Student has been selected.



×

### Adding a Curb-To-Curb Stop

To create the Stop, make sure that the Student you want the Stop to be assigned to, but not other undesired Students, is selected. You can easily see this by checking the yellow color of the icon on the Map and/or the Student record in the search list. Then, click on the **Curb-To-Curb Stop** button.

| Routes Runs Stops Vehicl   | les Workspace  | Result Students Ac   | tion Requests AVL |                  | \$ 9 1   | +-@@   | At .    | > + h Ø   | 🖉 💢 Merge            | Move Add to<br>New Run      |
|--|----------------|--|-------------------|------------------|--|--|---------|---|----------------------|-----------------------------|
| Attending School V<br>5996<br>0596<br>3901<br>5920<br>SCHOOL<br>School<br>ADA<br>Show all run revisions with stu<br>SEARCH RESULTS: 231 STUDENTS | udent details. | Grades Student I<br>00<br>01<br>02<br>Urb to Curb Stop New Student I<br>Last Name<br>First<br>Name:<br>Card Id:<br>New Student I | te:               | ▲<br>int Results | Errest fell<br>Forms fell<br>Cormony<br>Numeri Ave | Para de la construcción de la co | a start | Philmont Alle<br>Student<br>D: C0057895<br>Name:<br>Address:<br>School:<br>Soloct | Pennsylvania         | Autority Pio                |
| STUDENT ID LAST NAME   | FIRST NAME     | ADDRESS  | SCHOOL            | CHG. REQ         | st toom  |  |         | Zoom to   |                      | Poque sera                  |
| Q C0004919   |                |  |                   |                  | and a state  | Leo Mall   |         | "a  | X                    | Provide a sing C            |
| CO035867   |                |  |                   |                  |  | R and  | Byt     |   | 5/ /                 |                             |
|  |                |  |                   |                  | 7son Rd  | 200  | Derry   |   | and                  | Benjamin Rush<br>State Park |
| C0057896   |                |  |                   |                  | JKA /  |  | stra    | Jornia &  | sever                |                             |
| Q <u>C0057897</u>  |                | and the second of  |                   | <b>+</b>         |  |  | Sour    | ces: Esri, HERE, Garmi  | n, USGS, Intermap, I | INC.                        |

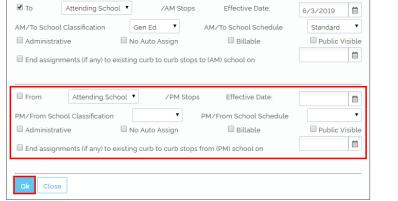
After you click on **Curb-To-Curb Stop**, a new window showing the fields required for the task appears. To complete this:

- Select **To/AM Stops** if the Student is going to be Picked Up at this Stop on the way to School.
- Enter the Effective date.
- Select Attending, Summer, Zone or Selected School from the drop-down menu.
- Select the appropriate type of Education (General, Especial or Magnet Programs).
- · Check any additional information boxes if required.

| CREATE CUR           | B-TO-CURB STOPS                                | ;                                  |            |  | 3                |
|----------------------|--|------------------------------------|------------|--|------------------|
| 🕑 То                 | Attending School 🔻                             | /AM St                             | ops        | Effective Date:                                      | 6/3/2019         |
| AM/To School         | Classification                                 | Gen Ed. 🔹                          | AM         | I/To School Schedule                                 | Standard •       |
| Administrat          | tive 🗌   | No Auto Assign                     |            | Billable   | Public Visible   |
| End assign           | ments (if any) to existi                       | ng curb to curb s                  | tops to (A | M) school on   | <b></b>          |
| From<br>PM/From Scho | Attending School<br>ool Classification<br>tive | PPM S     VPM S     No Auto Assign |            | Effective Date:<br>/From School Schedule<br>Billable | e Public Visible |
| End assign           | ments (if any) to existi                       | ng curb to curb s                  | tops from  | (PM) school on                                       | <b></b>          |
| Ok Close             |  |                                    |            |  |                  |

| Once  | finished  | with | the | first | section, | move | on | to | the |
|-------|-----------|------|-----|-------|----------|------|----|----|-----|
| secon | id one an | d:   |     |       |          |      |    |    |     |

- Select To/PM Stops if the Student is going to be Dropped Off at this Stop on the way back from School.
- Enter the Effective date.
- Select Attending, Summer, Zone or Selected School from the drop-down menu.
- Select the appropriate type of Education (General, Especial or Magnet Programs).
- Check any additional information boxes if required.
- Click **OK.** The new Curb-To-Curb Stop will be created and the selected Student assigned to it.



2

CREATE CURB-TO-CURB STOPS

## Assigning Pick Up and Drop Off Times: Bulk Update

Remember that every Stop must be linked to Pick Up and Drop Off locations, since every Student picked up at a particular Stop is necessarily dropped off at another. These locations are included in any Curb-To-Curb Stop that you create but you still need to add Pick Up and Drop Off times to the Stop afterwards. You can review Pick Up and Drop Off times and delay allowance (hard vs soft windows) in the Stops menu section of the tutorial <u>Understanding Stops</u>.

To add Pick Up and Drop Off times to the Curb-To-Curb Stop, you can select the Stop on the Map, click Update within the pop-up Bus Stop window and enter the information in the Pick Up and Drop Off menus. To review this, read the tutorial <u>Adding Stops in the Map</u>.

If for any reason you have created more than one Curb-To-Curb Stops, you can update this information with the **Bulk Update** tool. To do so, select the Stops on the Map or in the search results list and then click Bulk Update above this.

| outes Runs | Stops        | Vehicles Works               | space | Result   | Student | s Action Reque | sts AVL       |      |           |      |                                    |        |                 |     |
|------------|--------------|------------------------------|-------|----------|---------|----------------|---------------|------|-----------|------|------------------------------------|--------|-----------------|-----|
|            | lear Filters | Clear Results                |       | to Works | ·       |                | Create Mirror | Remo | ve Mirror | Svc. | Time                               | Delete | Groups          | ols |
|            | RUN \$       | PICK                         | LDTM  | СВ       | DLY     | TIME           | DROP          | ULTM | СВ        | DLY  | TIME                               | TRTM   | ASSIGNED RIDERS | W   |
| -          | 4209 AM      | ALGARD AND L.                | 0     | ES       | DA      | -              |               | 0    | ES        | DA   | 7:50 AM- 7:55 A                    |        | 1               | 0   |
| <u> </u>   |              |                              |       |          |         |                |               |      |           |      |                                    |        |                 |     |
|            | 4209 AM      | FERNDALE ST &                | 0     | ES       | DA      | 5:00 AM- 8:20  |               | 0    | ES        | DA   | 8:25 AM- 8:30 A                    |        | 0               | 0   |
|            |              | FERNDALE ST &<br>WOODRIDGE A |       | ES<br>ES | DA      | 5:00 AM- 8:20  |               | 0    | ES        | DA   | 8:25 AM- 8:30 A<br>7:50 AM- 7:55 A |        | 0               | 0   |

A new **Stop Information Bulk Update** window will appear. Let's assume that these Curb-To-Curb Stops are created as AM Stops, which means the assigned Students are picked up by their residences in the morning and taken to School.

To add Pick Up and Drop Off times to the Stops, follow these steps:

- 1. Select the **School** from #2 drop-down menu (#1 menu is for School Pick Up).
- 2. On the right, select the corresponding AM Bell Time.
- 3. The **Drop Off Time Window** at School should be displayed below. Select both Drop Off boxes (After and By).
- Select **Pick Up Time Delay**. If bus Delay is allowed, enter this in minutes. Remember that certain Delays may be reasonable (soft window) at Pick Up Stops.
- 5. Do the same for **Drop Off Time Delay**. Remember that arrival at School is subject to Bell Time and little flexibility is allowed (hard window).
- 6. Select curb side if necessary.
- 7. Click OK.

| STO |        | RMATION BULK UPDATE    |                                    | × |
|-----|--------|------------------------|------------------------------------|---|
|     | Update | Setting                | Value                              |   |
| 1   |        | ۲                      | •                                  |   |
|     |        | Pick Up After          |                                    |   |
|     |        | Pick Up By             |                                    |   |
| 2.  | 5901   | CHE ST MACHINE THE     | (To-School) AM IN BELL TIME: 8.1 🔻 |   |
|     |        | Drop Off After         | 7:50 AM                            |   |
|     |        | Drop Off By            | 7:55 AM                            |   |
| 4.  |        | Load Time              | Min.                               |   |
| 5.  |        | Unload Time            | Min.                               |   |
| 6.  |        | Max Transit Time       | Min.                               |   |
| 7.  |        | Pick Up Time Delay     | Allow delay of 🔹 10 Min. 🔶         |   |
| 8.  |        | Drop Off Time Delay    | No delays 🔹 Min. 🔶                 |   |
| 9.  |        | Num Passengers         |                                    |   |
| 10. |        | Pick Up Curb Approach  | Either side of vehicle 🔻 🔶         |   |
| 11  |        | Drop Off Curb Approach | Right side of vehicle 🔹 🗲          |   |
| 12. |        | Pick Up School         |                                    | • |
| 13. |        | Drop Off School        |                                    | • |
| 14. |        | Preference             |                                    |   |
|     | Ok     | Close                  |                                    |   |

### **Creating Stops for Returning Runs: Mirroring**

If you have completed AM Stops, you can use the Create Mirror Tool to create PM Stops so that Students can be picked up at School and returned to their residences following reverse Runs.

Mirroring is a quick way to turn AM Stops into PM Stops, specially when multiple Stops need to be included in the process. To learn about Mirroring, read the tutorial <u>Mirroring Stops</u>.

### Assigning Students to Stops

Adding new Students to the database is a common event in Compass Routing. Occasionally, a new Stop has to be created to service those Students. In other cases, the Students have to be assigned to existing Stops.

Whatever the case may be, Students always need to be linked to Stops and, depending on the situation, users can follow different workflows to perform this task.

### In the Map

Let's start by assuming that a new Student has been enrolled in a particular School. This Student has to be assigned to a Stop that is close enough to the Student's residence in order to provide effective transportation service. The Stop will often be an existing one but sometimes it may be necessary to create a new Stop. To review how to do this, read <u>Adding Stops in the Map</u>.

If the Student's record and the Stop have already been created and added with their corresponding addresses to the database, you can locate the Student and the Stop on the Map. To review how to find Students, read the tutorial *Finding Existing Students*.

### Selecting Students and Stops

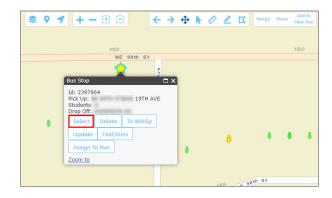
Once the Student and the Stop have been located on the Map, you will need to select them both. There are two different ways to do this:

#### CLICK AND SELECT

- Select the **Student** by clicking the icon on the Map. A Student information window will be displayed.
- Click Select. You'll notice that the Student icon switches to yellow.



- Select the **Stop** by clicking the icon on the Map. A Bus Stop information window will be displayed.
- Click the **Select** button. Again, you'll notice that the Stop icon switches to yellow.

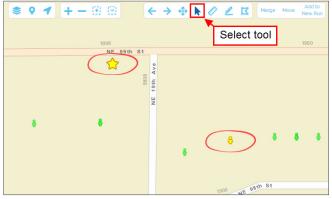


#### USE THE SELECT TOOL

Remember that you can always use the Select Tool to select Students and Stops on the Map faster. To do so:

- Find and click on the Select Tool in the upper section of the Map.
- Click on the map close to the Student or the Stop to be selected and simultaneously drag the cursor from corner to corner to select the Student or the Stop before releasing the mouse button. A selection rectangle will be visible while dragging the cursor.

You can also click on the icon and, when the corresponding pop-up window displays, click the **Select** button.



You might need to zoom in first to isolate the Student or the Stop and make the selection easier.

The color of the icons will switch from green to yellow on the Map to indicate that they have been selected.

Notice that you can select both (or more, in other cases) at the same time.

### 2 Assigning Students to Stops

Once you have selected the Student and the Stop, proceed to assign the Student to the selected Stop by following these steps:

- First, make sure you are in the Student Management Menu. If you are not, click the Students tab to display it.
- Click the Assign button.
- A message will appear at the bottom of the map prompting you to **right-click on the Map**. Do so (you can click anywhere on the Map).
- An action selection window will appear. Click Assign Students to Stop to complete the task.

| R Schools Z Barriers   | 🎓 Depots    | Stops                                      |   | 🕆 Tiering     | 🛢 Data 🗸  | 📋 Reports 🗸  | 💄 SSD                            | Portal 🌼 | Admin |  |   |
|--|-------------|--|---|---------------|-----------|--------------|----------------------------------|----------|-------|--|---|
| Routes Runs Stops Vehicle  | s Workspace | Result St                                  | udents Ac   | tion Requests |           |              |                                  |          |       |  |   |
| Attending School   G58 - 658  245 - ALKI MS  10x - ANDERSON - iTech  10a - ANDERSON - ITech  21a - Output for  5  5  5  5  5  5  5  5  5  5  5  5  5 | Transfer    | Grades<br>01<br>02<br>03<br>urb to Curb St | Student I<br>Last Nam<br>First<br>Name:<br>Card Id: |               | Ik Update | ssign Symbol | is ADA                           |          |       | Assign Students to Stop<br>Show Address<br>Add Stop<br>Link Stop to Location |   |
| SEARCH RESULTS: 877 STUDENTS   |             |  |   |               |           |              |                                  |          | Right | Add Point of Interest<br>Add Barrier   |   |
| STUDENT ID LAST NAME     O00148671   | FIRST NAME  | ADDRESS                                    |   | SCHOOL        | CHG. R    |              | CHG DT<br>3/14/2019 5:02         |          | Click | Add Depot  | 1 |
| Q         000152823           Q         000171357  |             |  |   |               |           |              | 3/14/2019 5:02<br>3/14/2019 5:02 |          |       |  |   |

### In the Stop Window

Another way to assign Students to Stops involves using the **New** or **Existing Stop** dialogs. But first, users need to create a Stop or find the Existing Stop to which the Students will be assigned.

To review how to create a new Stop, read the tutorial <u>Adding Stops with the New Stop Button</u>. To review how to find an existing Stop, read the tutorial <u>Understanding Stops</u>.

### Selecting Stops

When creating a New Stop, you can access the **Find Students** menu directly by clicking on its tab. On the contrary, if you have searched for an existing Stop, you will need to **select** it from the search results list by checking off the box next to it. Then:

- Click on the Stop ID. An Existing Stop window will appear.
- Click the Find Students tab. The Find Students menu will be displayed.

| 😭 Schools 🚧 Barriers 🎓 Depots 🐵 Stops 🔫 Tiering 🛢 Data   | 🕐 🏥 Reports 🗸 🔹 SSD Portal 🛛 🏟 Admin   | ? 9 - Logout   |
|--|--|--|
| Routes Runs Stops Vehicles Workspace Result Students Action Reques   | AVL <b>\$ 9 1</b> + - ⊕ ⊕ ⊕ ← → ⊕  | Kerry Run  |
| Schools         Grades         Pickup:           Check All Schools         0000 - 0-EXCEPTIONS         Dropoff:           5901 -         01         Stop Id:           ACADEMY         02         V  | EXISTING STOP<br>Stop Id: 3031960<br>Pick Up Drop Off Date/Class Stop Student, Find Students<br>Student ID:  | Alternate Stop #: 2942486  |
| Student ID/Name:   | Add to Stop       Map       Table         Effective Date:       Image: Check All Schools         STUDENTS SEARCH RESULTS (0)       Image: Check All Schools  | OO     Miles 05     OI     OI     Search for     Students at     Drop Off     Find      SCHOOL     GRADE |
| Image: Search Results:         Add to Workspace         Bulk Update         Clear Filters           SEARCH RESULTS:         16 STOPS (1 SELECTED: 0 STUDENTS, 0 WHEELCHAIRS)         Standard Standar |  |  |
| D D C RUN PICK LDTM CB DLY TIME  | 20   |  |
|  | RD   |  |
|  | RC   | 8  |
|  |  |  |
|  | ok close   |  |
|  |  |  |
|  | RD astrong and a state of the s |  |

## **2** Finding and Assigning Students to Stops

Depending on whether you have created a new Stop or searched for an existing one, a New or an Existing Stop dialog will appear. These dialogs look identical.

The **Find Students** tab within these two dialogs presents two search options. A first section allows users identify the Student by ID, Last Name and First Name, and a second section provides School and Grade search filters.

A Find button is located on the right of the Grade filter section.

To Find and Assign Students to the Stop from the Find Students tab:

- 1. Enter Student ID, Last Name and First Name if you know them. Otherwise, select the boxes next to the corresponding School and Grade. On the right, you have the option to filter the search by Students who live within the walk to Stop distance or by Students at Drop-off.
- Select the Map or the Table option to display the matching Students as you prefer.
- Click Find. A list with the matching Students will appear in the table below and/or the Map, depending on your previous selection.
- 4. Select the desired Student from the list.
- 5. Once you have selected the Student, enter the Dates when the assignment of the Stop should start being Effective and when it should End.
- Click Add to Stop. A window asking you to confirm this action will pop-up. Click OK to confirm.

| top Id: 30319  | 60   |               |             |                             | Alternate Stop #: | 2942486                     |
|--|--|---------------|-------------|-----------------------------|-------------------|-----------------------------|
| Pick Up Drop (   | ff Date/Class  | Stop Students | Find Studen | ts                          |                   |                             |
| Student ID:  |  | 5996 -        |             | ACADEMI                     | <b>^</b>          | • 🗆 Walk                    |
| Last Name:   |  | 0596 -        |             | ACMORPHY 2                  | 00                | Miles 0                     |
| Circh Norman   |  | ☑ 3901 -      |             | 1000000                     | 01                | Sear<br>Student             |
| First Name:  |  | 5920 -        | -           | A REAL PROPERTY AND INCOME. | ↓ 02              | <ul> <li>Drop Of</li> </ul> |
|  |  |               |             |                             |                   | Find                        |
|  |  |               |             |                             |                   |                             |
| Add to Stop  | 🗆 Мар 🕑 Та   | ble           | 2           |                             |                   |                             |
|  | <u> </u>   |               |             |                             |                   |                             |
| Add to Stop<br>Effective Dat                               |  | ble End D     |             | 2019                        |                   | ,                           |
| Effective Dat  | a: 5/24/2019   | End D         |             | 2019                        |                   |                             |
| Effective Dat  | <u> </u>   | End D         |             | ADDRESS                     | SCHOOL            | GR                          |
| Effective Dat  | 5/24/2019<br>RCH RESULT (232   | End D         | ate: 5/31/  |                             | SCHOOL            | <b>GR</b><br>01             |
| Effective Dat  | 2: 5/24/2019<br>RCH RESULT (232<br>IT ID ALT. STUDEN<br>19   | End D         | ate: 5/31/  |                             | SCHOOL            |                             |
| Effective Dat  | 5/24/2019           RCH RESULT (232           IT ID           ALT. STUDEN           19           46                                      | End D         | FIRST       |                             | SCHOOL            | 01                          |
| Effective Dat  | 5/24/2019           RCH RESULT (232           IT ID           ALT. STUDEN           19           46           00                         | End D         | FIRST       |                             | SCHOOL            | 01                          |
| Effective Dat  STUDENT SEA  STUDE C0057  C0046 C0046 C0048 | 5/24/2019<br>RCH RESULT (232<br>IT ID ALT. STUDEN<br>19<br>46<br>00<br>225   | End D         | FIRST       |                             | SCHOOL            | 01                          |
| Effective Dat  | 5/24/2019           RCH RESULT (232           IT ID         ALT. STUDEN           19           46           00           25           26 | End D         | FIRST       |                             | SCHOOL            | 01<br>02<br>02<br>11        |

7. A new window confirming that the Students have been added to the Stop will appear. Click **OK** again.

# Mirroring Stops

Although there are exceptions, Stops are normally created for AM Runs because taking Students from home to School generally happens in the morning. However, once this is done, users will need to create reverse PM runs that buses follow to drive Students back to their residences. In other words, if Students are picked up at their residential Stop and dropped off at School in the morning, the will likely be picked up at School and dropped off at their residential Stops in the afternoon. This means that the corresponding Stops also need to be created.

A quick method to do this task in Compass, specially when multiple Stops are involved, is what we call **Mirroring**. This process turns Pick Up locations into Drop Off locations and vice-versa.

### **Finding and Selecting Stops**

Before you can mirror any Stops, you have to find them and select them. You can either do this in the search results table or in the Map. Remember that, in the Map, you have the option to select the Stops by clicking on the icons or using the select tool as explained in the tutorial <u>Creating Curb-To-Curb Stops</u>.

| COMPASS F  | Route Bu      | <b>ilder</b><br>172.31.56.152     |         |          |          |             |               |    | Current Scenario 2018-2019ISYI •   |
|--|---------------|-----------------------------------|---------|----------|----------|-------------|---------------|----|--|
| 🔒 School   | s 🚧 Bari      | riers 🏫 Depo                      | ots 🤄   | Stops    |          | M 🐨 Tieri   | ng 🛢 Data 🗸   |    | 💼 Reports 🗸 💄 SSD Portal 🔅 Admin 💿 🕒 🖌 🕞 Logout  |
| Routes Run:  | s Stops \     | /ehicles Works                    | pace F  | Result   | Students | Action Requ | iests AVL     |    |  |
|  | lear Filters  | Clear Results                     |         | to Works |          | Bulk Update | Create Mirror | Re | Upper ublin Twp  |
| ID   | ILTS: 3 STOPS | (3 SELECTED: 0 ST<br>PICK         | UDENTS, | CB       | DLY      | TIME        | DROP          | UL |  |
| <ul> <li>✓ <u>3202683</u></li> <li>✓</li> </ul>                | 2             | 1391 Cinnamon Dr                  |         | ES       | DA       | -           |               | 0  | Don the Mondauk  |
| <ul> <li><u>3202685</u> ○</li> <li><u>3202684</u> ○</li> </ul> |               | 1472 Mundock Rd<br>1339 Dillon Rd | 1       | ES<br>ES | DA       | -           |               | 0  | Belect Stops   |
|  |               |                                   |         |          |          |             |               |    | And Home of the contract of th |

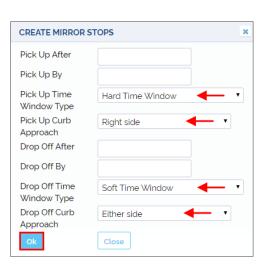
### **Create Mirror**

Once you have selected the Stops, click the **Create Mirror** button above the search results table. The Create Mirror window will appear. Then:

- 1. Select Pick Up Time Window Type. If we assume that these Runs will go from School to the Student's residence, Pick Up should be at School and its Window Type should be Hard because it depends on the Bell Time.
- 2. Select Pick Up Curb Approach.
- 3. Select Drop Off Time Window Type. Since Drop Off should regularly be at the Student's residence, Window Type will normally be Soft.
- 4. Select Drop Off Curb Approach.

Notice that you can also add Pick Up and Drop Off Time Window limits if needed.

5. Click OK. A window showing a Mirror Stops Created message is displayed.



### Entering Pick Up and Drop Off Times: Bulk Update

Once you have mirrored the AM Stops to create PM Stops for the reverse Run, you can quickly input time information with the Bulk Update tool. To do so, select the Stops you want top update on the Map or in the search results list and then click **Bulk Update** above.

| Find      | Clear Filters  | Clear Results       | Add t   | o Worksp | bace   | Bulk Update | Create Mirror | Remov | e Mirror | Svc. T | ime  | New | Delete | Groups   | Symbols |
|-----------|----------------|---------------------|---------|----------|--------|-------------|---------------|-------|----------|--------|------|-----|--------|----------|---------|
| SEARCH RE | SULTS: 3 STOPS | S (3 SELECTED: O ST | UDENTS, | O WHEEL  | CHAIRS | 5)          |               |       |          |        |      |     |        |          |         |
| D ID      | RUN            | PICK                | LDTM    | СВ       | DLY    | TIME        | DROP          | ULTM  | СВ       | DLY    | TIME |     | TRTM   | ASSIGNED | RIDERS  |
| 3202683   | 9              | 1391 Cinnamon Dr    | 1       | ES       | DA     | -           |               | 0     | ES       | DA     | -    |     |        | 0        |         |
| 3202685   | 9              | 1472 Mundock Rd     | 1       | ES       | DA     | -           |               | 0     | ES       | DA     | -    |     |        | 0        |         |
| 3202684   | 9              | 1339 Dillon Rd      | 1       | ES       | DA     | -           |               | 0     | ES       | DA     | -    |     |        | 0        |         |

A new Stop Information Bulk Update window will appear. To add Pick Up and Drop Off times to the Stops, follow these steps:

- 1. Select the **School** from #1 drop-down menu (#2 menu is for School Drop Off).
- 2. On the right, select the corresponding PM Bell Time.
- The Pick Up Time Window at School should be displayed below. Select both Pick Up boxes (After and By).
- Select **Pick Up Time Delay**. Since bus Delay is not allowed, enter No Delays. Remember that departure from School is subject to Bell Time and little flexibility is allowed (hard window).
- Do the same for Drop Off Time Delay. Remember that certain Delays may be reasonable (soft window) at residential Drop Off Stops.
- Select Pick Up and Drop Off Curb Approach and select what is appropriate from the drop-down menus.
- 7. Click **OK**. The information will be updated.

| U          | Jpdate | Setting                | Value      |                 |           |        |  |
|------------|--------|------------------------|------------|-----------------|-----------|--------|--|
| 1.         | 5901 - | URD ST MULTICULTURE    | (From-So   | hool) PM OUT B  | ELL TIN 🔻 | ←      |  |
|            |        | Pick Up After          | 3:35 PM    | ◀-              |           |        |  |
|            |        | Pick Up By             | 3:40 PM    | ←               |           |        |  |
| 2.         |        | ۲                      |            |                 | ۲         |        |  |
|            |        | Drop Off After         |            |                 |           |        |  |
|            |        | Drop Off By            |            |                 |           |        |  |
| 4.         |        | Load Time              |            | Min.            |           |        |  |
| 5.         |        | Unload Time            |            | Min.            |           |        |  |
| <b>S</b> . |        | Max Transit Time       |            | Min.            |           |        |  |
| 7.         |        | Pick Up Time Delay     | No delay   | ′s •            |           | Min. 🔶 |  |
| 3.         |        | Drop Off Time Delay    | Allow de   | lay of 🔹        | 15        | Min. 🔶 |  |
| 9.         |        | Num Passengers         |            |                 |           |        |  |
| ).         |        | Pick Up Curb Approach  | Either sic | le of vehicle 🔻 | ←         |        |  |
| 1.         |        | Drop Off Curb Approach | Either sic | le of vehicle 🔹 | -         |        |  |
| 2          |        | Pick Up School         |            |                 |           |        |  |
| 3.         |        | Drop Off School        |            |                 |           |        |  |
| 4.         |        | Preference             |            |                 |           |        |  |

### **Checking Mirrored Stops**

You can make sure the Stops have been mirrored by selecting **Mirrored** in the search filter section of the screen. The mirrored Stops will be displayed in the search result list.

If you have completed the process correctly, you should be able to see **AM Stops** with residential Pick Up and School Drop Off as well as **PM Stops** with reversed Pick Up and Drop Off locations.

| Student ID     | /Name:          |                           |            | Al          | l       |                     | •                 |        |          |        |                  |        |                 |      |
|----------------|-----------------|---------------------------|------------|-------------|---------|---------------------|-------------------|--------|----------|--------|------------------|--------|-----------------|------|
| Eff. Date B    | etween          | 🛗 And                     |            | 6           |         |                     |                   |        |          |        |                  |        |                 |      |
| 🗌 Only W       | ith Students As | signed 🔲 Only W           | Vithout St | udents A    | ssigned | b                   |                   |        |          |        |                  |        |                 |      |
| 🔲 Find trij    | p order/stops w | ith no bus assigr         | nment      |             |         |                     | •                 |        |          |        |                  |        |                 |      |
| 🗆 Use Ge       | ofence 🗌 Unge   | eocoded 🗆 Whe             | elchair 🗌  | Aide        | ESY     | Create new result 🔹 | •                 |        |          |        |                  |        |                 |      |
| 🗌 Gen Ed       | 🗆 Sp Ed 🔲 Ma    | agnet                     |            |             |         |                     |                   |        |          |        |                  |        |                 |      |
| Schedu         | ıle Standard 🗌  | Late In 🔲 Early           | Out 🗆 La   | te Activity | у       |                     |                   |        |          |        |                  |        |                 | N    |
| 🗆 Admin        | 🗆 Billable 🔲 M  | 1ed Need 🔲 Incl           | . 🗆 No A   | uto Assigi  | n       |                     |                   |        |          |        |                  |        |                 | 3    |
| Exclude        | e Zero Assigned | Rider Count 🗹             | Mirrored   | 🔲 Not Mi    | irrored |                     |                   |        |          |        |                  |        |                 |      |
| 🗷 Find         | Clear Filters   | Clear Results             | Add to     | o Workspa   | ace     | Bulk Update         | Create Mirror     | Remove | e Mirror | Svc. T | me               | Delete | Groups          | ools |
| SEARCH RE      | SULTS: 8 STOPS  | O SELECTED: O ST          | rudents,   | O WHEEL     | CHAIRS) | )                   |                   |        |          |        |                  |        |                 |      |
| D ID           | RUN             | РІСК                      | LDTM ≑     | СВ          | DLY     | TIME                | DROP              | ULTM   | СВ       | DLY    | TIME             | TRTM   | ASSIGNED RIDERS |      |
| <u>1454447</u> | AM              |                           | 0          | NU          | DA      | 1:30 PM- 1:30 PM    | 1 Bend street PSL | 2      | NU       | ND     | 2:00 PM- 2:00 P. | . 2    | 1               |      |
| <u>1454533</u> |                 | School                    | 0          | NU          | ND      | 1:30 PM- 1:30 PM    | 1 Golden Ave PSL  | 2      | NU       | ND     | 2:00 PM- 2:00 P. | 2      | 2               |      |
| <u>1454577</u> | Q,              |                           | 0          | RS          | DA      | -                   | Rogers Ave PSL    | 0      | RS       | ND     | -                |        | 0               |      |
| <u>1454651</u> | Q,              | Construction of the local | 0          | RS          | DA      | -                   | United Bulevart   | 0      | RS       | ND     | -                |        | 0               |      |
| <u>1454448</u> | PM              | Bend street PSL           | 1          | RS          | DA      | 1:10 PM- 1:10 PM    | The second second | 0      | RS       | DA     | 1:20 PM- 1:20 PM | 2      | 3               |      |
| <u>1454594</u> |                 | Rogers Ave PSL            | 1          | RS          | DA      | 1:05 PM- 1:05 PM    | School            | 0      | RS       | ND     | 1:25 PM- 1:25 PM |        | 2               |      |
| <u>1454695</u> | Q.              | United Bulevart           | 1          | RS          | DA      | 1:05 PM- 1:05 PM    | 301001            | 0      | RS       | ND     | 1:25 PM- 1:25 PM |        | 0               |      |
| <u>1454520</u> | 9               | Golden Ave PSL            | 1          | RS          | DA      | 1:05 PM- 1:05 PM    |                   | 0      | ES       | ND     | 1:25 PM- 1:25 PM |        | 1               |      |

## **MANAGING VEHICLES**

## **Understanding Vehicle Management**

Compass uses the term Vehicles to refer to all the vehicles available for route planning.

But these generally include several types of vehicles that have different characteristics and, depending on those, users will need to discriminate which vehicles are suitable for the routes they want to design.

### **Vehicle Properties**

In general terms, vehicle types need to be selected in accordance with the maximum number of riders and occupancy allowance, but also options of equipment and aids must be taken into account when assigning vehicles to service a specific route.

Some of these options are technical. For example, the availability of AVL or GPS systems is crucial for tracking and location purposes. Others, including maximum route and drive times or maximum total distance, are related to vehicle safety. Seat belts, safe vests, wheelchairs or specialties such as air condition or aides assigned, depend on Students' needs.

Beyond that, customers can also consider operating costs per hour or per mile as additional options that address financial factors.

Fleets are held in depots and where these are located is an essential piece of information from the beginning of any routing project, since such locations will normally be the start and the final destination of every route. So, the location of those depots will also be decisive in the selection of vehicles.

### Vehicle Management Tool

In order to undertake vehicle management tasks, users can access the Vehicle Management tool by clicking on the **Vehicles** tab located under the main toolbar, on the left section of the screen.

Vehicle search can be done with the aid of filters that are distributed in various sections:

- a. The first filter allows the selection of Vehicle Profiles from a drop-down menu. These Profiles are created to group vehicles with similar characteristics and equipment.
- b. The two following sections can be used to search for vehicles assigned to Schools or accessible at the existing depots by selecting the corresponding boxes in separate scroll-down menus.
- c. If needed, users can select vehicles with Wheelchairs, with Aide, with Air Condition, with Spare vehicle availability or AVL/GPS equipped.
- d. Vehicle Number and Attributes filters are also available.
- e. Finally, users can also search for Vehicles With No Runs during certain periods of time.

See the following figure to have a better understanding of the distribution of these features on your screen.

### **Compass User Guide**

| Routes Runs Stops Vehicles Worksp   | ace Result Students A   | ction Requests A\      | /L                 |           |       |       |     |     |
|---|-------------------------|------------------------|--------------------|-----------|-------|-------|-----|-----|
| Please Select A Vehicle Profile:  | Default Profile 🔻       |                        |                    | (         | a     |       |     |     |
| Schools   | Depots                  | Specialt<br>AC<br>Aide |                    | <b>^</b>  | b     |       |     |     |
| With Wheelchairs Spare With AVL/<br>Number Attributes<br>Vehicle with no runs from dd/mm/yyyy |                         | nicle Configuration T  | ype 🔻              | c         |       |       |     |     |
| Find Clear Filters and Results Add to   | o Workspace Add to Wate | ch Profiles No         | ew Bulk Update     | Delete    |       |       |     |     |
| VEHICLES(O)   |                         |                        |                    |           |       |       |     |     |
| VEHICLE NUMBER VEHICLE CONF. TYP  | E PROFILE AFTER BEFO    | RE DEPOT U             | SE TYPE MAX. STOPS | MAX. TIME | RDR V | VC SV | BLT | AVL |

The Vehicle Management tool displays several buttons with different functionalities above the search result list:

- Find: Displays search results in the table below.
- Clear Filters and Results: Remove results from the table.
- Add to Workspace: Adds selected Vehicles to the Workspace so that they can be used to generate Runs.
- Add to Watch.
- Profiles: Gives access to the Vehicle Profile Management dialog.
- New: Adds a New Vehicle to the Scenario.
- Bulk Update: Updates the information of various Vehicles at the same time. To learn more, read the tutorial Editing Vehicles.
- **Delete**. Removes a Vehicle from the scenario.

| Fir | nd           | Clear Filters and | Results Add     | d to Workspace | Add to  | Watch   | Profile | 5 N  | lew Bul  | k Update De | elete     |     |    |    |     |       |
|-----|--------------|-------------------|-----------------|----------------|---------|---------|---------|------|----------|-------------|-----------|-----|----|----|-----|-------|
| VE  | VEHICLES (6) |                   |                 |                |         |         |         |      |          |             |           |     |    |    |     |       |
|     |              | VEHICLE NUMBER    | VEHICLE CONF. 1 | TYPE PROFILE   | AFTER   | BEFORE  | DEPOT   |      | USE TYPE | MAX. STOPS  | MAX. TIME | RDR | WC | SV | BLT | AVL   |
|     | 7            | 8B648             |                 | Default Pro    | 4:00 AM | 6:00 PM |         | TRA  |          | 30          |           | 71  | 0  | 0  | 0   |       |
|     | 3            | 8B660             |                 | Default Pro    | 4:00 AM | 6:00 PM |         | TRA_ |          | 30          |           | 29  | 0  | 0  | 0   |       |
|     | 1            | 8L190             |                 | Default Pro    | 4:00 AM | 6:00 PM |         | TRA  |          | 30          |           | 18  | 1  | 0  | 0   | 20000 |

The search results table shows the most relevant Vehicle Features of each of the listed Vehicles. These include:

- Vehicle Number, Configuration Type and Profile.
- Earliest time the Vehicle can leave the Depot and Latest time the Vehicle can leave the Depot.
- Assigned Depot.
- Use Type.
- Maximum number of Stops.
- Maximum ride Time.
- Number of Riders.
- Wheel Chair capacity.
- Number of Safe Vests and Seat Belts available.
- AVL equipped.

## **Editing Vehicles**

You have the option to Edit any existing Vehicle within your Scenario if necessary. To find, select and edit existing vehicles:

- 1. Select the appropriate search filters as explained in the <u>Vehicle Management</u> tool section.
- 2. Click the Find button. A search result list with the matching Vehicles will be displayed below.
- 3. Click on the Vehicle record icon on the left of the Vehicle Number. A Vehicle Details window will appear.

| Find   | Clear Filters and | Results Add to     | Workspace    | Add t   | o Watch | Profiles | New Bu   | ılk Update | Delete    |     |    |    |     |     |
|--------|-------------------|--------------------|--------------|---------|---------|----------|----------|------------|-----------|-----|----|----|-----|-----|
| VEHICL | ES (86)           |                    |              |         |         |          |          |            |           |     |    |    |     |     |
|        | VEHICLE NUMBER    | VEHICLE CONF. TYPE | PROFILE      | AFTER   | BEFORE  | DEPOT    | USE TYPE | MAX. STOPS | MAX. TIME | RDR | WC | SV | BLT | AVL |
| - 😭    | CB 13-101         |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
| - 😭    | CB 13-106         |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
|        | CB 13-108         |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
| - 😭    | CB 13-110         |                    | Default Pro_ | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
|        | CB 13-111         |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
| - 🔗    | CB 13-113         |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
| - 😭    | CB 13-118         |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |
| 🗆 😭    | CB 13-1180        |                    | Default Pro  | 4:00 AM | 6:00 PM | CITY CAB |          | 30         |           | 0   | 0  | 0  | 0   |     |

Within the Vehicle Details window, input the required information in the corresponding fields. These fields are displayed in various sections spotlighted in the figures to help you follow the instructions.

| VEHICLE DET     | AILS                           |                               |          |  |
|-----------------|--------------------------------|-------------------------------|----------|--|
| Profile: Defaul | t Profile                      |                               |          |  |
| Vehicle #       | CB 13-108                      | Notes                         |          |  |
| 🗆 Spare Vehi    | cle                            | Stall #                       |          |  |
| AVL Device      |                                | Odometer                      |          |  |
| ID              |                                |                               |          |  |
| AVL Account     | ** select one AVL Account ** 🔻 |                               |          |  |
| Max Riders      | 0                              | Wheelchairs                   | 0        |  |
| Seat Belt       | 0                              | Safety Vest                   | 0        |  |
| Max Stops       | 30                             | Max Route                     |          |  |
|                 |                                | Time (Min.)                   |          |  |
| Max Drive       |                                | Max Total                     |          |  |
| Time (Min.)     |                                | Distance                      |          |  |
|                 |                                | (Miles)                       |          |  |
| Start After     | 4:00 AM                        | Start Before                  | 6:00 PM  |  |
| Start Depot     | CITY CAB                       | <ul> <li>End Depot</li> </ul> | CITY CAB |  |

| Profile: Defaul | t Profile                      |                               |          |
|-----------------|--------------------------------|-------------------------------|----------|
| Vehicle #       | CB 13-108                      | Notes                         |          |
| Spare Vehi      | cle                            | Stall #                       |          |
| AVL Device      |                                | Odometer                      |          |
| ID              |                                |                               |          |
| AVL Account     | ** select one AVL Account ** 🔻 |                               |          |
| Max Riders      | 0                              | Wheelchairs                   | 0        |
| Seat Belt       | 0                              | Safety Vest                   | 0        |
| Max Stops       | 30                             | Max Route                     |          |
|                 |                                | Time (Min.)                   |          |
| Max Drive       |                                | Max Total                     |          |
| Time (Min.)     |                                | Distance                      |          |
|                 |                                | (Miles)                       |          |
| Start After     | 4:00 AM                        | Start Before                  | 6:00 PM  |
| Start Depot     | CITY CAB                       | <ul> <li>End Depot</li> </ul> | CITY CAB |

#### Within the first set of fields you can:

- Select Spare Vehicle if needed.
- Enter AVL Device ID if required.
- Select the appropriate AVL Account.
- Enter Notes, Stall number and Odometer data.

Notice that the **Vehicle Number** assigned to the selected vehicle, located on the upper-left corner, can't be modified.

Below you can:

- Enter the maximum number of **Riders** allowed.
- · Enter the capacity for Wheelchairs on the vehicle.
- Enter the number of **Seat Belts** and **Safety Vests** available on the vehicle.

Max Occupy 100

Distance

Weight Vehicle Type

Operating

Cost/Mile

Vehicle

Year

Type of

Service

Inspection

Classification

VIN Number

÷

Δ

| Profile: Defaul       | t Profile                      |                          |  |
|-----------------------|--------------------------------|--------------------------|--|
| Vehicle #             | CB 13-108                      | Notes                    |  |
| 🔲 Spare Vehi          | cle                            | Stall #                  |  |
| AVL Device<br>ID      |                                | Odometer                 |  |
| AVL Account           | ** select one AVL Account ** 🔻 |                          |  |
| Max Riders            | 0                              | Wheelchairs 0            |  |
| Seat Belt             | 0                              | Safety Vest 0            |  |
| Max Stops             | 30                             | Max Route<br>Time (Min.) |  |
| Max Drive             |                                | Max Total                |  |
| Time (Min.)           |                                | Distance<br>(Miles)      |  |
| Start After           | 4:00 AM                        | Start Before 6:00 PM     |  |
| Start Depot           | CITY CAB                       | End Depot     CITY CAB   |  |
| Max Occupy            | 100                            | Time Weight              |  |
| %                     |                                |                          |  |
| Distance<br>Weight    |                                | Fixed Cost               |  |
| Vehicle Type          | •                              | Operating O              |  |
| Operating             |                                | Cost/Hour<br>Vehicle     |  |
| Cost/Mile             | 0                              | Configuration            |  |
|                       |                                | Туре                     |  |
| Vehicle<br>Inspection | •                              | Specialties AC           |  |
| Classification        |                                | AC Aide                  |  |
| VIN Number            |                                | - Alde                   |  |
| Year                  | \$                             |                          |  |
| Type of               |                                |                          |  |
| Service               |                                |                          |  |

Time Weight

Fixed Cost

Operating

Cost/Hour Vehicle

Configuration

Specialties

AC

Close

Aide

Туре

0

• 😰

Under the previous fields:

- Enter the **Maximum Number of Stops** per Run the vehicle can make and maximum **Route Time** (allowed time on the road per day, including Stops and waits).
- Enter the Maximum Drive Time (allowed time on the road per day, excluding Stops and waits) and Maximum Total Distance.
- Enter **Start After** and **Start Before** (earliest and latest times at which the vehicle must leave the Depot).
- Select the **Depots** where the Run must Start and End.

In the second half of the Vehicle Details window, you will find several other fields where you can select more Vehicle Details, such as:

- Maximum Occupancy.
- Operating Costs per mile and per hour.
- Vehicle Inspection Classification and Number (VIN).
- Type of Service.
- Vehicle Configuration Type or VCT (codes describing capabilities and equipment).
- AC or Aide Specialties.

## NOTE: Editing Vehicles is Specific to Scenarios

Editing existing Vehicles will update data only within a specific Scenario but this won't be automatically applied to other Scenarios.

You can Add New Vehicles to your Scenario. To do so, follow these steps:

- Make sure you have selected the Vehicle Management Tool by clicking on the Vehicles tab.
- Click on the New button. A Vehicle Details window will be displayed.
- Enter the information as explained in the Editing Vehicles section. Not all the fields will be necessary.

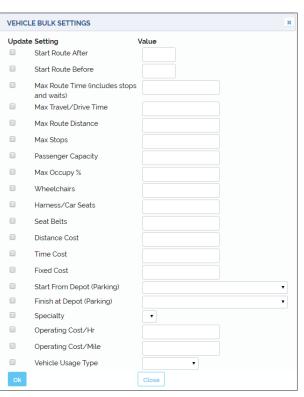
# Bulk Update

The Bulk Update tool provides another convenient way to edit the information of several Vehicles at the same time. To do this:

- 1. Make sure you select only the Vehicles to be updated in the result list after you have done the necessary search.
- 2. Click the **Bulk Update** button above the list. A Vehicle Bulk Settings window will appear.
- 3. Within this window, check the required bulk settings and enter the appropriate data in the corresponding fields.

If needed, review the terminology in the previous section.

- 4. Find the Start From Depot (depot at which the Route starts) Finish at Depot (depot at which the Route ends), and Vehicle Usage Type (general, special or multipurpose education) options in three different drop-down menus and select the correct options.
- 5. Click **OK.** The updated data will be saved.



| 🛯 Schools 🛛 🏧 Bar   | riers 🎓 Depots     | Stops  |               | 🐨 Tiering      | 🛢 Data 🗸                  | <ul> <li>Reports</li> </ul> | × 4       | SSD Portal | 🌣 Admin |
|---|--------------------|--|---------------|----------------|---------------------------|-----------------------------|-----------|------------|---------|
| Routes Runs Stops   | Vehicles Workspace | ce Result S  | Students Acti | on Requests    | AVL                       |                             |           |            |         |
| Please Select A Vehicle Pro   | ofile:             | Default Profile Depots I I I I I I I I I I I I I I I I I I I | •             | <b>^</b>       | cialties ——<br>AC<br>Aide |                             | ×         |            |         |
| With Wheelchairs Sp<br>Number Attr<br>Vehicle with no runs from<br>Find Clear Filters and<br>VEHICLES (150) | ibutes dd/mm/yyyy  | through dd/m   |               | le Configurati |                           |                             | elete     |            |         |
| VEHICLE NUMBER  | VEHICLE CONF. TYPE | PROFILE AF   | TER BEFORE    | DEPOT          | USE TYPE                  | MAX. STOPS                  | MAX. TIME | RDR W      | c sv    |

# NOTE: Adding Vehicles is Specific to Scenarios

Adding new Vehicles will update data only within a specific Scenario but this won't be automatically applied to other Scenarios.

### **Deleting Vehicles**

You can Delete Existing Vehicles from your Scenario. To do so, follow these steps:

- Make sure you have selected the Vehicle Management Tool by clicking on the Vehicles tab.
- 2. Select appropriate search filters as previously explained in the Vehicle Management tool section.
- 3. Click on the **Find** button. A search result list with the matching Vehicles will be displayed below.
- 4. Select the Vehicles to be deleted.
- 5. Click on the **Delete** button. The Vehicle will be deleted from the Scenario.

| i <b>Ai</b> So | hools 🚧 Bar           | riers 🎓 Depots     | 回 Stop         | s 😭 V    | 'IM 😪   | Tiering    | 🛢 Data 🗸               | 📋 Reports    | 🗸 🔒 S     | SD Porta | ι 🗢 | Admin |     |
|----------------|-----------------------|--------------------|----------------|----------|---------|------------|------------------------|--------------|-----------|----------|-----|-------|-----|
| Routes         | Runs Stops            | /ehicles Workspa   | ce Result      | Students | Action  | Requests   | AVL                    |              |           |          |     |       |     |
| Please S       | elect A Vehicle Pro   | ofile:             | Default Profil | e 🔻      |         |            |                        |              |           |          |     |       |     |
| School         | is<br>ack All Schools |                    | Depots         |          |         | <b>^</b>   | cialties<br>AC<br>Aide |              |           |          |     |       |     |
| With With      | Wheelchairs 🔲 Sp      | oare 🔲 With AVL/G  | PS             |          |         |            |                        |              |           |          |     |       |     |
| Number         | Attr                  | ibutes             |                | •        | Vehicle | Configurat | on Type 🔹              |              |           |          |     |       |     |
| Vehicle v      | vith no runs from     | dd/mm/yyyy         | through dd,    | /mm/yyyy |         |            |                        |              |           |          |     |       |     |
| Find           | Clear Filters and     | Results Add to     | Workspace      | Add to   | Watch   | Profiles   | New Bu                 | lk Update De | lete      |          |     |       |     |
| VEHICL         | ES (12)               |                    |                |          |         |            |                        |              |           |          |     |       |     |
|                | VEHICLE NUMBER        | VEHICLE CONF. TYPE | PROFILE        | AFTER    | BEFORE  | DEPOT      | USE TYPE               | MAX. STOPS   | MAX. TIME | RDR      | WC  | SV    | BLT |
| •              | YB 18-00              |                    | Default Pro    | 4:00 AM  | 6:00 PM |            |                        |              |           | 72       | 0   | 0     | 0   |
| 🗹 😁            | YB 18-000             |                    | Default Pro    | 4:00 AM  | 6:00 PM |            |                        |              |           | 48       | 0   | 0     | 0   |
| - 1            | YB 18-1               |                    | Default Pro    | 4:00 AM  | 6:00 PM |            |                        | 30           |           | 72       | 0   | 0     | 0   |
|                | YB 18-10              |                    | Default Pro    | 4:00 AM  | 6:00 PM |            |                        | 30           |           | 72       | 0   | 0     | 0   |

# NOTE: Deleting Vehicles is Specific to Scenarios

Deleting existing Vehicles will update data only within a specific Scenario but this won't be automatically applied to other Scenarios.

# Managing Vehicle Profiles

Vehicles having different characteristics and configurations can be grouped in categories called Vehicle Profiles. The **Vehicle Profile Management** tool can be accessed by clicking on the **Profiles** button, located in the <u>Vehicle Management</u> screen above the Vehicle find/ results table.

This tool allows:

- Deleting or selecting Existing Profiles for further Update.
- Adding New Profiles.

| VEHICLE PR      | OFILE MAN   | IAGEMEN   | т        |              |        | × |
|-----------------|-------------|-----------|----------|--------------|--------|---|
| PROFILES        |             |           |          | Profile Name |        |   |
| ACTIONS         | PROFILE NA  | CREATED   | CREATED  | Add New      | Update |   |
| Select   Delete | Default Pro | 6/5/2017. | USER-AD. |              |        |   |
|                 |             |           |          |              | Close  |   |
|                 |             |           |          |              |        |   |
|                 |             |           |          |              |        |   |
|                 |             |           |          |              |        |   |
|                 |             |           |          |              |        |   |
|                 |             |           |          |              |        |   |
| •               |             |           | ×.       |              |        |   |

## **GENERATING RUNS**

## Understanding Workspace

Compass Route Builder uses the Workspace as a temporary storage area where selected Stops and Vehicles can be added to generate Runs. It also allows users to review and modify existing Runs. The Workspace is accessed by clicking on the Workspace tab.

There are three quick action buttons on the upper section of the Workspace menu:

- Solve Runs is used to generate a Run with the selected data (Stops and Vehicles) in the Workspace.
- Unassign all Stops is used to unlink Stops from Vehicles in the Workspace.
- Clear Workspace is used to remove all data from the Workspace.

Several other Workspace tools can be disclosed by clicking the Expand button, on the right of the previous tools.

| 🛯 Schools 🛛 🚧 Barri       | ers 🎓 Depots             | 🐵 Stops 🛛 😭 V     | IM 😙 Tiering  | 🛢 Data 🗸         | 📋 Reports | <ul> <li>SSD Por</li> </ul> | rtal 🏾 🌣 Admin |
|---------------------------|--------------------------|-------------------|---------------|------------------|-----------|-----------------------------|----------------|
| Routes Runs Stops Ve      | workspace                | Result Students   | Action Reques | ts AVL           | CI        | ick to display              | r tools        |
| Solve Runs   Unassign a   | ll stops   Clear Workspa | ace               |               |                  |           |                             | *              |
| Use Barriers              | 🗌 Use Bell 1             | imes              | S S           | atial Clustering | J         |                             | Use Depots     |
| O Use Assigned Riders cou | unt 🔍 Use Actua          | al Riders count   | Sele          | ct an action     | • 🗗       | Vehicle Type                | Auto Select 🔹  |
| Select All Vehicles 1     | Add VC                   | Ts Add Runs       |               |                  |           | Fleet Routing (With         | vehicles) 🔻    |
| VRP Advanced Settings     |                          |                   |               |                  |           |                             |                |
| Schedule vs Mileage Prior | ity to Reduce Mileage    | •                 |               |                  | Riding    | Reduce Ride Time F          | Per Student 🔹  |
| U-Turns No U              | J Turns Allowed          | T                 |               |                  |           |                             |                |
| Unassigned Stops in Works | space: 0                 |                   |               |                  |           |                             |                |
| ROUTING PLAN (O VEHICLE(S | 5))                      |                   |               |                  |           |                             |                |
| RUN VEHICLE               | NUMBER VEHICLE C         | ONF. TYPI PROFILE | STOPS ASS     | GNMENT RULE      | AFTER BEF | ORE DEPOT                   | TIME RDR       |

These functionalities can be described as follows:

- When Use Barriers is checked, Compass considers existing barriers to generate the Run. Barriers can be created and checked in the Workspace at users' discretion to prevent Vehicles from entering certain areas. For example, some roads might not be suitable for full-size vehicles and barriers bounding affected areas could be necessary.
- When **Use Bell Times** is checked, Compass considers those Bell Times linked to Stops added to the Workspace when generating the Run. Notice that any schedule or Time Window (soft vs hard) conflicts should be resolved before the system can generate the Run.
- Selecting **Spatial Clustering** forces the system to group Stops based on their location and link Routes to those groups (Spatial Clusters). By doing so, Compass attempts to generate efficient Routes, which cross each other as little as possible, making the best use of the selected Vehicles.
- If **Use Depots** is selected, the routing task considers the available Depots.
- In the **Fleet Routing** or **Simple Routing** drop-down menu users can chose to display the Routing with or without specific Vehicles. If Vehicles are not specified, the system will allocate an optimal Vehicle for each Run.
- The **Select an Action** new drop-down menu allows users to Unassign all Stops, Remove checked Vehicles from the Workspace and Unassign Stops, and Remove checked Vehicles and related Stops from the Workspace.

- Vehicle Type. This can be used to select the preferred Type of Vehicle.
- Select all Vehicles. Used to select all the Vehicles in the Workspace.

## Vehicle Routing Problem

Within the Workspace dialog, Compass users can access additional Advanced Settings called VRP, or Vehicle Routing Problem.

| Routes   | Runs      | Stops    | Vehicles     | Workspace      | Result     | Students | Action Reque     | ests AVL   |                     |             |      |
|----------|-----------|----------|--------------|----------------|------------|----------|------------------|------------|---------------------|-------------|------|
| Solve F  | Runs      | Unassig  | n all stops  | Clear Works    | space      |          |                  |            |                     |             | *    |
| 🗆 Use B  | arriers   |          | 🗆 Us         | e Bell Times   | 5          | 6        | Spatial Clust    | ering      |                     | 🗆 Use Dej   | pots |
|          |           |          |              |                |            |          | Select an action |            | Vehicle Type        | Auto Select | •    |
| C Select | t All Vel | nicles 1 | •            | Add VCTs       | Add Runs   |          |                  |            | Fleet Routing (With | vehicles)   | •    |
| VRP Adva | anced S   | Settings | -            |                |            |          |                  |            |                     |             |      |
| Schedul  | le vs Mi  | leage L  | et System Se | elect Priority | •          |          |                  | Riding     | Reduce Ride Time    | Per Student | •    |
| U-Turns  | ;         | A        | t Dead-Ends  | Only           | •          |          |                  |            |                     |             |      |
| Unassig  | ned Sto   | ps in Wo | orkspace: 0  | STOP           |            |          |                  |            |                     |             |      |
| ROUTING  | G PLAN    |          |              |                |            |          |                  |            |                     |             |      |
|          | RUN       | N VE     | HICLE NUMB   | ER VEHICLE     | CONF. TYPE | PROFILE  | STOPS            | ASSIGNMENT | RULE AFTER          | BEFORE      | DEP  |

VRP helps users modify several default parameters that affect the way buses operate. The tool presents three different drop-down menus that allow the selection of the preferred set up before Compass generates a Run. Let's see what these menus mean and the options the provide:

- 1. Schedule vs Mileage. Sometimes users may want to prioritize meeting time schedules over reducing mileage or vice versa. This tool allows the selection of:
  - Let System Select Priorities.
  - Priority to Meet Time Schedule.
  - Priority to Reduce Mileage of the Route.
- 2. U-Turns. Depending on their characteristics and other considerations, buses may or may not be allowed to do U-Turns. This tool displays four available options that users may select:
  - U-Turns allowed Everywhere.
  - U-Turns allowed at Dead-Ends.
  - U-Turns allowed at Intersections and Dead-Ends Only.
  - No U-Turns Allowed.
- **3. Riding**. In a similar way, customers may want buses to pick up all the Students before dropping them off at School at the same time, or may prioritize reducing ride time per Student, which might require buses to stop at School to drop-off Students more than once to complete the Route. The menu offers three options to select:
  - Let System Select Priorities.
  - Stop at School Once.
  - Reduce Ride Time per Student.

Once the preferred options have selected, these can be saved by clicking **OK**. The system will notify the user that settings have been changed. The dialogue can be closed by clicking on **Close**.

## Solving a Run

Remember that, in Compass, a Run is a set of directions used by a driver to drive the bus off a Depot, pick up Students at assigned Stops, drop those Students off at the selected place (generally a School) and then drive back to the Depot or proceed to complete another Run.

### Adding Data to the Workspace

Before you can generate a Run in the Workspace, you need to add the Stops and the Vehicles that will be included in the Run.

To add Stops to the Workspace:

- Click on the Stops tab to access the Stops Management tool.
- Find and select the Stops. To review how you can do this, read Understanding Stops.
- Click the Add to Workspace button.

| ۸  | Find   | ear Filters | Clear Results  | Add to | Workspa | ace I | Bulk Update | Create Mirror  | Remov | e Mirror | Svc. T | ime New          | Delete | Groups Symbols  |
|----|--|-------------|----------------|--------|---------|-------|-------------|----------------|-------|----------|--------|------------------|--------|-----------------|
| SE | SEARCH RESULTS 24 STOPS (4 SELECTED O STUDENTS, O WHEELCHAIRS) |             |                |        |         |       |             |                |       |          |        |                  |        |                 |
|    | ID   | RUN 🜩       | PICK           | LDTM   | СВ      | DLY   | TIME        | DROP           | ULTM  | СВ       | DLY    | TIME             | TRTM   | ASSIGNED RIDERS |
|    | <u>3031950</u> Q   | 4692 AM     | 32ND ST / ALLE | 0      | NU      | DA    | -           | 63RD ST. MULTI | 0     | ES       | ND     | 8:30 AM- 8:30 A. |        | 0               |
|    | <u>3031953</u> 🔍   | 4692 AM     | 27TH ST / YORK | 0      | NU      | DA    | -           | 63RD ST. MULTI | 0     | ES       | ND     | 8:30 AM- 8:30 A. |        | 0               |
|    | <u>3031955</u> Q   | 4692 AM     | 39TH ST / HAVE | 0      | NU      | DA    | -           | 63RD ST. MULTI | 0     | ES       | ND     | 8:30 AM- 8:30 A. |        | 0               |
|    | <u>3031951</u> Q   | 4692 AM     | 26TH ST / ALLE | 0      | NU      | DA    | -           | 63RD ST. MULTI | 0     | ES       | ND     | 8:30 AM- 8:30 A. |        | 0               |

2

To add Vehicles to the Workspace:

- Make sure you have accessed the Vehicle Management tool by clicking on the Vehicles tab first.
- Find and select the preferred Vehicle for the projected Run. To review how to do this, read Understanding Vehicle Management.
- Once the Vehicles are selected, click on the Add to Workspace button.

| Find | d             | Clear Filters and | Results Add to W   | /orkspace    | Add to  | Watch   | Profiles | New Bulk ( | Jpdate Dele | ete       |     |    |    |     |     |
|------|---------------|-------------------|--------------------|--------------|---------|---------|----------|------------|-------------|-----------|-----|----|----|-----|-----|
| VEH  | VEHICLES (12) |                   |                    |              |         |         |          |            |             |           |     |    |    |     |     |
|      |               | VEHICLE NUMBER    | VEHICLE CONF. TYPE | PROFILE      | AFTER   | BEFORE  | DEPOT    | USE TYPE   | MAX. STOPS  | MAX. TIME | RDR | WC | SV | BLT | AVL |
|      | ~             | YB 18-00          |                    | Default Pro_ | 4:00 AM | 6:00 PM | ASPIRA   |            |             |           | 72  | 0  | 0  | 0   |     |
|      | ~             | YB 18-000         |                    | Default Pro_ | 4:00 AM | 6:00 PM | ASPIRA   |            |             |           | 48  | 0  | 0  | 0   |     |
|      | 7             | YB 18-1           |                    | Default Pro  | 4:00 AM | 6:00 PM | ASPIRA   |            | 30          |           | 72  | 0  | 0  | 0   |     |
|      | 7             | YB 18-10          |                    | Default Pro  | 4:00 AM | 6:00 PM | ASPIRA   |            | 30          |           | 72  | 0  | 0  | 0   |     |
|      | 7             | YB 18-2           |                    | Default Pro_ | 4:00 AM | 6:00 PM | ASPIRA   |            | 30          |           | 72  | 0  | 0  | 0   |     |

### Selecting the Appropriate Settings and Solving the Run

Now that Stops and Vehicles have been added to the Workspace, they can be used to generate a Run.

The last step before the system can solve the Run is the selection of the appropriate options within the Workspace.

Make sure you have accessed the Workspace by clicking on its tab.

Then, chose the preferred options as follows:

- 1. Select your options from the main menu as explained in the <u>Understanding Workspace</u> section:
  - Select Use Barriers, Bell Times, Spatial Clustering or Depots as preferred.
  - · Select Use Assigned Riders count or Actual Riders count.
  - If required, **Select an Action** from the drop-down menu, click the arrow on the right to apply the action.
  - · Select Vehicle Type or keep the auto select in the provided drop-down menu.
  - Select Fleet or Simple Routing.
- 2. If Fleet Routing was selected, proceed to the **VRP** section below for Advanced Settings and select what is appropriate as explained in the <u>Vehicle Routing Problem</u> tutorial. Choose your settings for:
  - Meet Schedule vs Reduce Mileage.
  - U-Turns.
  - Riding.
- 3. If Simple Routing (without vehicles) was selected, proceed to the Settings for Runs Without Vehicles displayed below.
- 4. Finally, click the **Solve Runs** button to let the system solve the Run.

| Routes  | Runs      | Stops     | Vehicles       | Workspace     | Result     | Students       | Action Rec | luests     | AVL               |          |                    |             |      |
|---------|-----------|-----------|----------------|---------------|------------|----------------|------------|------------|-------------------|----------|--------------------|-------------|------|
| Solve   | Runs      | Unassig   | gn all stops   | Clear Worksp  | ace        |                |            |            |                   |          |                    |             | *    |
| Use I   | Barriers  |           |                | 🗌 Use Bell Ti | mes        |                | 🗹 sp       | atial Cl   | ustering          |          |                    | 🗌 Use Dep   | oots |
| O Use   | Assigne   | d Riders  | count          | Use Actual    | Riders co  | ount           | Selec      | ct an acti | ion 🔹 🗖           | 1        | Vehicle Type       | Auto Select | •    |
| Selee   | ct All Ve | hicles    | . •            | Add VCTs      | Add        | Runs           |            |            |                   | F        | leet Routing (With | vehicles)   | •    |
| VRP Adv | vanced    | Settings  |                |               |            |                |            |            |                   |          |                    |             |      |
| Schedu  | ule vs M  | ileage    | Priority to Re | duce Mileage  | •          |                |            |            | F                 | Riding R | educe Ride Time I  | Per Student | •    |
| U-Turn  | าร        | 1         | No U Turns A   | llowed        | •          |                |            |            |                   |          |                    |             |      |
| Unassig | gned Ste  | ops in W  | orkspace: 9    |               |            |                |            |            |                   |          |                    |             |      |
| ROUTIN  | IG PLAN   | (1 VEHICI | _E(S))         |               |            |                |            |            |                   |          |                    |             |      |
|         | RUN       | VEH       |                | R VEHICLE     | CONF. TYPE | PROFILE        | STOPS      | ASSIG      | NMENT RULE        | AFTER    | BEFORE             | DEPOT       | TIME |
| 5100    |           | B102      | 2              |               |            | Default Profil | e O        | 1 - Pres   | erve Stop Assign. | 4:00 AM  | 6:00 PM            | BROAD STRE  |      |

## **Understanding Results**

Once Compass has solved the Run, a Results dialog and a Map displaying the corresponding Run automatically appear on the screen.

### **The Results Screen**

#### A. RESULTS TABLE

Within the dialog, a Results Table discloses data pertaining to the generated Run, including Run ID, Vehicle Number, Vehicle Profile, Effective Date, Duration of Run, Distance of Run, Start and End Times at Depots and number of Stops projected for the Run.

| -             | Stops Vehic      | cles Workspace        | Result Suc      | dents Action Req    | uests AVL     |          | _       | _          |       |
|---------------|------------------|-----------------------|-----------------|---------------------|---------------|----------|---------|------------|-------|
| Reports       | Select a report. |                       |                 | •                   |               |          | R       | un         |       |
| Show All Runs | s   🖥 Save Res   | sult Runs   🗙 Clear A | All Runs   Move | e to Workspace   Ef | fective Date: | I        | Apply   | _          |       |
| RESULTS (1)   |                  |                       |                 |                     |               |          |         |            |       |
| ÷             | RUN              | VEHICLE NUMBER        | PROFILE         | EFFECTIVE DATE      | DURATION      | DISTANCE | START   | END        | STOPS |
|               |                  |                       |                 |                     | 04.44         |          |         | 5 44 4 4 4 | 9     |
|               | B102-R-06-       | _ B102                | Default Profile | e                   | 01:41         | 58.47    | 4:00 AM | 5:41 AM    | 5     |

#### B. REPORTS

A Report Selection tool is located above as a drop-down menu. This allows the user to review different aspects of the Run when the appropriate Report type is selected. Among the available Report types you can find:

- Route Comparisons.
- Route Stops.
- Route Directions.
- Route Assignments.
- Stop Assign Status.
- Student Routes.
- Route Directions with Passengers.
- Route Stops with Passengers.
- Route Stops with User Times.
- Route Directions with User Times.
- Route Directions with Passengers and User Times.

If you want to create one of this Reports:

- 1. Select the **Run** in the Results table.
- 2. Select the preferred Report type from the Reports drop-down menu.
- 3. Click on the **Run** button on the left of the Reports drop-down menu.

The Results Table also displays two icons (Stops List and Run Directions) and a color bar (Line Symbology Tool) preceding the actual data:

#### C. THE STOPS LIST

By clicking the first icon (on the left) users can access the **Stops List** of the Run.

The upper section holds different functionalities that allow the user to:

- Visualize and replace automatically generated ID to meet customers' conventions.
- Visualize and re-assign Vehicle Profiles.
- Visualize and re-assign Run Types.
- Apply Statistics.
- Enter Effective and End Dates.
- Enter Driver Sign-in and Sign-out times.
- Specify Active weekdays.
- Add optional Notes.

| Run #/Name:   | 4692 AM  |  | Revision 12 of  | 4692 AM R:1   | 11 Type:  |   | AM   | •         |
|---|--|--|---|---|---|---|--|-----------|
|   | Х  |  |   |   |   |   |  |           |
| Vehicle /<br>Profile:   | <u>5B3111</u>  |  |   |   | Dead Head   | Miles To:                                 | 6.33   | \$        |
| Apply Run   | Stats.   |  |   |   | Dead Head   | Miles Return:                             | 9.79   | \$        |
| Run Billable:   |  |  |   |   | Number of<br>Service:   | Days of                                   | 0  | ¢         |
| Effective Date:   | 5/14/2019  |  | Driver Sign-in tin  | ie:   | <b> </b>  |   |  |           |
| End Date:   |  | i  | Driver Sign-out   |   | <b></b>   |   |  |           |
| Notes:  |  | ue 🗹 Wed   | 🗹 Thu 🗹 Fri 🗌 Sat   | 🗆 Sun   |   |   |  |           |
| Notes:<br>DISMISSAL 3   | 30PM<br><u>stab</u>   Modify   | y User Arriv   | Thu    Fri □ Sat     Sat     re Times:    Sat     Shift      OUP SAME STOPS     STOPS   |   | ale X Reset   |   |  |           |
| Notes:<br>DISMISSAL 3   | 30PM<br><u>stab</u>   Modify   | y User Arriv<br>D) 🕑 GR  | re Times: ② <u>Shift</u><br>OUP SAME STOPS  |   |   | R ARRIVE TIME                             | LOAD/UNLOAD                                  | TIME (MII |
| Notes:<br>DISMISSAL 3<br>Add To Stop:<br>STOPS FOR VEH  | 30PM<br><u>stab</u>   Modify   | y User Arriv<br>D) 🕑 GR  | re Times: O <u>Shift</u><br>OUP SAME STOPS<br>IPTION / ADDRESS  | Expand Sca  |   | R ARRIVE TIME                             | LOAD/UNLOAD                                  | TIME (MII |
| Add To Stop:<br>STOPS FOR VEH   | 30PM<br>• tab   Modif<br>ICLE: 5B3111 (10<br>Q n/a                                       | y User Arriv<br>D) I GR<br>STOP DESCR<br>DURHAM-PE   | re Times: O <u>Shift</u><br>OUP SAME STOPS<br>IPTION / ADDRESS  | Dist. Sys. ARR  | VE TIME USER  | 59 AM                                     | LOAD/UNLOAD                                  | TIME (MII |
| Aotes:<br>DISMISSAL 3<br>Add To Stop:<br>STOPS FOR VEH  | 30PM<br>s tab   Modif<br>ICLE: 583111 (10<br>Q n/a<br>Q pick up                          | y User Arriv<br>D) C GR<br>STOP DESCR<br>DURHAM-PE<br>GERMANTOV  | VE TIMES: OSHIFT<br>OUP SAME STOPS<br>IPTION / ADDRESS  | Expand         Sca           DIST.         SYS. ARRI           0         0           0         0737 AM  | VE TIME USEF  | 59 AM<br>20 AM                            |  | TIME (MI  |
| STOPS FOR VEH   | 30PM<br>stab   Modif<br>ICLE: 583111 (10<br>Q n/a<br>Q pick up<br>Q pick up              | y User Arriv<br>D) GR<br>STOP DESCR<br>DURHAM-PE<br>GERMANTOV<br>11TH ST & LO                                | Ye Times: Oshift<br>OUP SAME STOPS<br>IPTION / ADDRESS<br>T<br>VIN AVE & HAINES ST .  | Expand         Sca           DIST.         SYS. ARRI'           0         0           0         0737 AM           256         0744 AM   | VE TIME USEF<br>05:0<br>06:1<br>06:2                          | 59 AM<br>20 AM                            | 0.00 min                                     | TIME (MI) |
| Notes:<br>DISMISSAL 3<br>Add To Stop:<br>STOPS FOR VEH<br>1 0<br>1 0<br>2 315107<br>3 3151545   | 30PM<br>tab   Modify<br>ICLE: 583111 (10<br>0 n/a<br>0 pick up<br>0 pick up<br>0 pick up | y User Arriv<br>D) C GR<br>STOP DESCR<br>DURHAM-PE<br>GERMANTOV<br>11TH ST & LO<br>32ND ST & C               | T<br>T<br>T<br>T<br>N<br>N<br>N<br>N<br>N<br>N<br>N<br>N<br>N<br>N<br>N<br>N<br>N   | Expand         Sci           DIST.         SYS. ARRI'           0         0           0         0737 AM           256         0744 AM           45         0753 AM  | VE TIME USER<br>05:<br>06:<br>06:                             | 59 AM<br>20 AM<br>32 AM<br>54 AM          | 0.00 min<br>0.00 min                         | TIME (MII |
| Notes:<br>DISMISSAL 3<br>Add To Stop:<br>STOPS FOR VEH<br>10<br>1<br>2<br>3<br>3151545<br>4<br>3051950  | 30PM   | y User Arriv<br>) I GR<br>STOP DESCR<br>DURHAM-PE<br>GERMANTOV<br>11TH ST & LO<br>32ND ST & C<br>30TH ST & D | e Times: Oshift<br>OUP SAME STOPS<br>IPTION / ADDRESS<br>T<br>VN AVE & HAINES ST<br>UNA VAE & HAINES ST<br>UNDEN ST PHILADELP.<br>UMBERLAND ST PHIL | Expand         Sci           DIST.         SYS. ARRIY           0         0           0.556         0.744 AM           4.5         0.753 AM           0.51         0.754 AM   | VE TIME USEF<br>05:<br>06:<br>06:<br>06:<br>06:               | 59 AM<br>20 AM<br>32 AM<br>54 AM<br>57 AM | 0.00 min<br>0.00 min<br>0.00 min             | TIME (MI  |
| Add         To         Stopp           Stopp         For         Veh           ID         ID         ID           1         ID         ID           2         ISISIO2         ISISIO2           3         ISISIO2         ISISIO2           4         ISISIO2         ISISIO2           5         ISISIO2         ISISIO2 | 30PM   | y User Arriv   | The Times: Shift (<br>OUP SAME STOPS<br>IPTION / ADDRESS<br>T<br>VN AVE & HAINES ST .<br>UDEN ST PHILADELP.<br>UDEN ST PHILADE.                     | Expand         Sci           DIST.         SYS. ARRIY           0         0           0         07.37 AM           256         07.44 AM           45         07.53 AM           0.51         07.54 AM           0.52         07.54 AM           3.08         08.05 AM | VE TIME USEF<br>065<br>065<br>065<br>065<br>065<br>065<br>070 | 59 AM<br>20 AM<br>32 AM<br>54 AM<br>57 AM | 0.00 min<br>0.00 min<br>0.00 min<br>0.00 min | TIME (MI) |

| The middle section of the window shows several      |
|---|
| buttons that allow the user to Modify Arrival Times |
| in various ways:                                    |

- **Shift**: Time shift can be applied to all the applicable stops. Number of minutes can be negative for a negative time shift.
- **Expand**: Additional time can be added cumulatively to every stop interval. This has the effect of expanding (or contracting) the travel time between stops. The number of minutes can be negative to contract the travel time.
- Scale: Every travel interval between stops can be changed proportionally to its original length. Positive values will increase the run and negative values will reduce it.
- Reset: Initial values can be restored.

| Run #/Name:   | 4692 AM   |   | Revision 12 of  | 4692 AM R:11  | Туре:   | AM •   |
|---|---|---|---|---|---|--|
|   | X   |   |   |   |   |  |
| /ehicle /<br>Profile:   | <u>5B3111</u>   |   |   |   | Dead Head Miles To:   | 6.33   |
| 🗆 Apply Run   | Stats.  |   |   |   | Dead Head Miles Re  | turn: 9.79                                   |
| Run Billable:   |   |   |   |   | Number of Days of<br>Service:   | 0  |
| Effective Date:   | 5/14/2019   |   | Driver Sign-in tir  | ne:   |   |  |
| End Date:   |   | ė   | Driver Sign-out   |   |   |  |
|   |   |   | time:   |   |   |  |
|   | 🗹 Mon 🗹 T   | ue 🗹 Wed 🛛  | 🗹 Thu 🗹 Fri 🔲 Sat   | t 🔲 Sun   |   |  |
| Active Days:<br>Jotes:<br>DISMISSAL 3<br>Octoor   | 30PM  | y User Arriv  | e Times: 🕗 <u>Shift</u>   | t 🗆 Sun<br>Expand 🕘 Scale   | e × Reset   |  |
| Iotes:<br>DISMISSAL 3<br>Add To Stop:   | 30PM<br><u>stab</u>   Modif   | y User Arriv<br>D) I GR   | e Times: O <u>Shift</u><br>OUP SAME STOPS   | Expand Scale  |   |  |
| Add To Stop:  | 30PM<br><u>s tab</u>   Modif<br>IICLE: 5B3111 (14   | y User Arriv<br>3)  | e Times: O <u>Shift</u><br>DUP SAME STOPS<br>PTION / ADDRESS  | Expand Scale  | TIME USER ARRIVE T  | IME LOAD/UNLOAD TIME (M                      |
| Add To Stop:  | 30PM<br><u>s tab</u>   Modif<br>IICLE: 5B3111 (1/   | y User Arriv<br>)   | e Times: O Shift<br>OUP SAME STOPS<br>PTION / ADDRESS   | Expand Scale     Scale     Dist. Sys. ARRIVE  | TIME USER ARRIVE TI   |  |
| Add To Stop:<br>Add To Stop:<br>STOPS FOR VEH   | 30PM<br>s tab   Moclif<br>IICLE: 583111 (14<br>Q n/a<br>t Q pick up   | y User Arriv<br>) C GR<br>STOP DESCRI<br>DURHAM-PE<br>GERMANTOV   | e Times: Oshift<br>DUP SAME STOPS<br>PTION / ADDRESS<br>T<br>IN AVE & HAINES ST -   | Expand Scale     Scale     Scale     O     O     O     O     O  | TIME USER ARRIVE TI<br>05.59 AM<br>06.20 AM   | 0.00 min                                     |
| Iotes:           DISMISSAL 3           Add To Stop:           STOPS FOR VEH           ID           1           2         3153107           3         3151545  | 30PM<br>stab   Moclif<br>IICLE: 583111 (14<br>Q n/a<br>Q pick up<br>pick up   | y User Arriv<br>b) C GR<br>STOP DESCRI<br>DURHAM-PE<br>GERMANTOV<br>11TH ST & LO  | e Times: O Shift<br>OUP SAME STOPS<br>PTION / ADDRESS<br>F<br>N AVE & HAINES ST -<br>JJDEN ST PHILADELP.  | Expand     Scale      Dist.     Sys. ARRIVE     0     0     7.37 AM     256     07.44 AM  | USER ARRIVE TI           05.59 AM           06.20 AM           06.32 AM                                   | 0.00 min<br>0.00 min                         |
| Add To Stop:           Add To Stop:           TOPS FOR VEH           ID           1           2         3153107           3         3151545           4         3051950   | 30PM<br>stab   Modif<br>IICLE: 583111 (1<br>Q n/a<br>Q pick up<br>Q pick up<br>Q pick up  | y User Arriv<br>D) C GR<br>STOP DESCRI<br>DURHAM-PE'<br>GERMANTOW<br>11TH ST & LOI<br>32ND ST & CI  | e Times: O Shift<br>DUP SAME STOPS<br>PTION / ADDRESS<br>F<br>NAVE& HAINES ST .<br>JDEN ST PHILADELP.<br>JMBERLAND ST PHIL                      | Expand         Scale           DIST         SYS. ARRIVE           0         0           0         0737 AM           256         0744 AM           45         0753 AM  | USER ARRIVE TI           05.59 AM           0620 AM           0632 AM           0654 AM                   | 0.00 min<br>0.00 min<br>0.00 min             |
| Add To Stop:<br>Add To Stop:<br>STOPS FOR VEH<br>1<br>2<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3  | 30PM<br>stab   Modif<br>IICLE: 583111 (14<br>Q n/a<br>Q pick up<br>Q pick up<br>Pick up | y User Arriv<br>) C GR<br>STOP DESCRI<br>DURHAM-PE'<br>GERMANTOV<br>11TH ST & LOI<br>32ND ST & CI<br>30TH ST & DI   | e Times Shift<br>OUP SAME STOPS<br>PTION / ADDRESS<br>T<br>IN AVE & HAINES ST .<br>JOEN ST PHILADELP.<br>MMEERLAND ST PHIL<br>AMOND ST PHILADE. | Expand         Scale           DIST         SYS. ARRIVE           0         07.37 AM           250         07.44 AM           0.51         0754 AM  | USER ARRIVE TI           05.59 AM           0620 AM           0632 AM           0654 AM           0657 AM | 0.00 min<br>0.00 min<br>0.00 min<br>0.00 min |
| Add To Stop:           B Add To Stop:           B Add To Stop:           B ID           I | 30PM stab Modif IICLE: 583111 (1/   | y User Arriv<br>500 C GR<br>5100 DESCRI<br>DURHAM-PEO<br>GERMANTOO<br>11TH ST & LO<br>32ND ST & CL<br>32ND ST & CL<br>32ND ST & CL<br>32NT ST & LO<br>32NT ST & DL<br>32NT ST & RIU | e Times: O Shift<br>DUP SAME STOPS<br>PTION / ADDRESS<br>F<br>NAVE& HAINES ST .<br>JDEN ST PHILADELP.<br>JMBERLAND ST PHIL                      | Excand         Scale           DIST.         Sys. ARRIVE           0         0           0         07.37 AM           256         07.44 AM           45         0753 AM           051         0754 AM           052         0756 AM | USER ARRIVE TI           05.59 AM           0620 AM           0632 AM           0654 AM                   | 0.00 min<br>0.00 min<br>0.00 min             |

Ζ

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The lower section shows a table with the actual Stop List. Here, users will find:

- Sequence number of the Stop (including Depots and Schools).
- Stop ID. By clicking on it, a new existing Stop Window will disclose detailed information of the Stop.
- Action taking place at the Stop.
- Description or Address.
- Distance, arrival times set by the system and by the user, curb approach specifications, time windows, etc.

Any required changes should be saved by clicking on the **Apply Changes** button at the bottom of the Stop List window.

Stops can be disclosed on the map by clicking on the magnifier icon locate before the Stops ID.

| Run #/Name:  | 4692 AM   |   | Revision 12 of   | 4692 AM F   | 2:11 Type    |  | AM                               | •          |
|--|---|---|--|---|--------------|--|----------------------------------|------------|
|  | X   |   |  |   |              |  |                                  |            |
| Vehicle /<br>Profile:  | <u>5B3111</u>   |   |  |   | Dead         | l Head Miles To:   | 6.33                             | ¢          |
| Apply Run  | Stats.  |   |  |   | Dead         | l Head Miles Return  | 9.79                             | ÷          |
| Run Billable:  |   |   |  |   | Num<br>Servi | ber of Days of<br>ce:  | 0                                | ¢          |
| Effective Date:  | 5/14/2019   |   | Driver Sign-in tir   | ne:   | iii (        |  |                                  |            |
|  |   |   |  |   | ė            |  |                                  |            |
| End Date:  |   | i iii   | Driver Sign-out  |   |              |  |                                  |            |
| Active Days:<br>Notes:   |   |   | Driver Sign-out<br>time:<br>I Thu I Fri 🗆 Sa   | t 🗆 Sun   |              |  | ,                                |            |
| Active Days:<br>Notes:<br>DISMISSAL 3  | 30PM<br><u>Istab</u>   Modi   | Tue 🗹 Wed   | time:  |   |              | Reset  | /                                |            |
| Active Days:<br>Notes:<br>DISMISSAL 3  | 30PM<br><u>Istab</u>   Modi   | Tue 🗹 Wed   | time:<br>☑ Thu ☑ Fri □ Sa<br>ve Times: ❷ <u>shift</u>  | Expand O S  |              | Reset  | LOAD/UNILOAD                     | D TIME (MI |
| Active Days:<br>Notes:<br>DISMISSAL 3<br>Add To Stop<br>STOPS FOR VEI  | 30PM<br><u>Istab</u>   Modi   | Tue 🗹 Wed   | time:<br>Thu Pri Sa<br>ve Times O Shift<br>ROUP SAME STOPS<br>RIPTION / ADDRESS  | Expand O S  | cale X       | •  | LOAD/UNLOAD                      | D TIME (MI |
| Active Days:<br>Notes:<br>DISMISSAL 3<br>Add To Stop<br>STOPS FOR VEI<br>DI<br>1<br>2<br>315310  | 330PM<br>Is tab   Modi<br>IICLE: 5B3111 (<br>Q n/a<br>Z Q pick up   | Tue 🗹 Wed<br>fy User Arri<br>10) 🖉 G<br>STOP DESC<br>DURHAM-P   | time:<br>Thu Pri Sa<br>ve Times O Shift<br>ROUP SAME STOPS<br>RIPTION / ADDRESS  | Expand S<br>DIST. SYS. ARI<br>0   |              | USER ARRIVE TIME   | LOAD/UNLOAD                      | D TIME (MI |
| Active Days:<br>Notes:<br>DISMISSAL 3<br>Add To Stop<br>STOPS FOR VEI<br>1 0<br>1 0<br>2 0 315310<br>3 0 315154  | 330PM<br>ISTAD   Modi<br>IICLE: 5B3111 (<br>Q n/a<br>Z Q pick up<br>2 Q pick up<br>2 Q pick up  | fy User Arri<br>10) C G<br>STOP DESC<br>DURHAM-P<br>GERMANTC  | time:<br>Thu Thu Fri Sa<br>ve Times: So Shift<br>ROUP SAME STOPS<br>RIPTION / ADDRESS<br>ET  | Expand     S     S     S     S     S     S     S     S     S     S     S     S     S     S     S  |              | USER ARRIVE TIME   |                                  | D TIME (MI |
| Active Days:<br>Notes:<br>DISMISSAL :<br>Add To Stop<br>STOPS FOR VEI<br>1<br>2 315154<br>4 305195   | 330PM<br>ISTAD   Modi<br>IICLE: 5B3111 (<br>Q n/a<br>Z Q pick up<br>2 Q pick up<br>2 Q pick up<br>2 Q pick up   | Tue Ved<br>fy User Arri<br>10) G<br>STOP DESC<br>DURHAM-P<br>GERMANTC<br>11TH ST & LO                         | time:<br>Thu I Fri Sa<br>ve Times Sanft<br>ROUP SAME STOPS<br>RIPTION / ADDRESS<br>ET<br>W/N AVE & HAINES ST.                          | Expand     S     Expand     S                 | cale X       | USER ARRIVE TIME<br>05:59 AM<br>06:20 AM                         | 0.00 min                         | D TIME (MI |
| Active Days:<br>Notes:<br>DISMISSAL 2<br><b>5</b> Add To Stor<br><b>5</b> OF FOR VEI<br>1<br>2<br>2<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>3 | 330PM<br>(CLE: 5B3111 (<br>CLE: 5B3111 (<br>C n/a<br>C pick up<br>C pick up<br>C pick up<br>C pick up<br>C pick up<br>C pick up   | fy User Arri<br>tue Ved<br>fy User Arri<br>to) Germantc<br>URHAM-P<br>GERMANTC<br>11TH ST & LU<br>32ND ST & 0 | time:<br>Thu Ø Fri Sa<br>ve Times Ø shift<br>ROUP SAME STOPS<br>RIPTION / ADDRESS<br>ET<br>WVIA VE & HAINES ST<br>DUDEN ST PHILADELP.  | Dist.         Sys. Art           0         0           0         07.37 Ah           256         07.44 Ah           45         0753 Ah                                       |              | USER ARRIVE TIME<br>05.59 AM<br>06.20 AM<br>06.32 AM             | 0.00 min<br>0.00 min             | D TIME (MI |
| Active Days:<br>Notes:<br>DISMISSAL :<br>Add To Stop<br>STOPS FOR VEI<br>1<br>2 315154<br>4 305195   | Big tab         Modil           Incle:         583111 (           Q         n/a           Z         pick up           Q         pick up | fy User Arri<br>10) C G<br>STOP DESC<br>DURHAM-P<br>GERMANTC<br>11TH ST & LU<br>32ND ST & C<br>30TH ST & C    | time:<br>Thu Ø Fri Sa<br>ve Times Ø Shift<br>ROUP SAME STOPS<br>RIPTION / ADDRESS<br>ET<br>W/N AVE & HAINES ST.<br>DUMBERLAND ST PHIL. | Expand         S           DIST.         SYS. ARI           0         07.37 AN           255         07.44 AN           45         07.53 AN           0.51         07.54 AN |              | USER ARRIVE TIME<br>05 59 AM<br>06 20 AM<br>06 32 AM<br>06 54 AM | 0.00 min<br>0.00 min<br>0.00 min | ) TIME (MI |

#### D. RUN DIRECTIONS

By clicking on the second icon (on the right), users can get detailed **Run Directions**.

The Run Directions window discriminates each Run included in the same Route and specifies:

- Report Date and Time.
- Run ID.
- Assigned Vehicle.
- Effective Date.
- Stop Descriptions and IDs.
- Directions from every Stop of the Run including distance.
- Number of Students to be picked up and dropped off at every Stop.
- School Bell Time and Time Window.

#### E. LINE SYMBOLOGY

By clicking on the color bar, users can access the Line Symbology tool.

This tool allows the application of specific colors, style and width to each generated Run so that they can be easily viewed on the Map. To do so:

- Pick the **Colors** by clicking on the palette or set by entering the exact color code in the color text box.
- Select the preferred **Width** from the available drop-down menu.
- Once the line parameters are chosen, click on the **Apply** button located on the left.

Run Directions

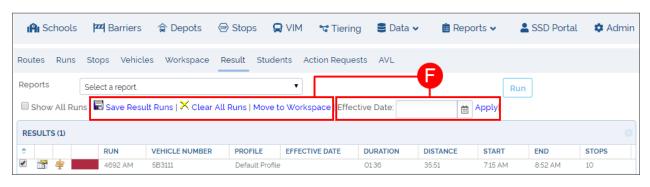
| YELLOWBIRD                                    | 07:11<br>AM          | Depot/Park |
|---|----------------------|------------|
| 0-1 Go southeast on Belfield Ave toward E Pen | n Stigo ~ 1.72 miles |            |
| 0-2 Bear right on Old York Rd                 | go ~ 0.15 miles      |            |
| 0-3 Turn left on Roosevelt Expy               | go ~ 0.3 miles       |            |
| 0-4 At fork keep right on Roosevelt Expy      | go ~ 0.07 miles      |            |
| 0-5 Continue on W Roosevelt Blvd              | go ~ 0.32 miles      |            |
| 0-6 At fork keep left on W Roosevelt Blvd     | go ~ 0.38 miles      |            |
| 0-7 At fork keep right on W Roosevelt Blvd    | go ~ 0.3 miles       |            |
| 0-8 At fork keep left on W Roosevelt Blvd     | go ~ 0.51 miles      |            |
| 0-9 At fork keep left on W Roosevelt Blvd     | go ~ 0.12 miles      |            |
| -10 At fork keep right on W Roosevelt Blvd    | go ~ 0.6 miles       |            |
| -11 At fork keep left on W Roosevelt Blvd     | go ~ 0.72 miles      |            |
| -12 Turn right on Pratt St                    | go ~ 0.16 miles      |            |
| -13 Turn left on Rutland St                   | go ~ 0.11 miles      |            |
| -14 Turn left on Bridge St                    | go ~ 0.03 miles      |            |

| Run            | 4692 AM 5B3111 |   |  |
|----------------|----------------|---|--|
| Color          | EC2FE6         |   |  |
| Style          |                |   |  |
| Width          |                | + |  |
| Width<br>Apply |                |   |  |

#### F. OTHER ACTIONS

Once the Run has been checked, other buttons allow additional tasks within the Result Menu (see figure below). Users can:

- Click Save Results to save the generated Run if it is satisfactory.
- Click Clear All Runs to remove Results from the Results Table.
- · Click Move to Workspace to edit the Runs in the Workspace.
- Enter the preferred **Effective Date** to be assigned to the Runs in the text box, or select it from the corresponding drop-down menu, and click **Apply**.



### The Map



For an easier understanding, let's assume that a user wants to generate an AM Run that only includes a Depot, a School and three Stops.

The start location of the Run should be the selected Depot and the end of the Run should be the School.

The other three Stops are also selected (they turn yellow on the Map) and added to the Workspace.



Once it is solved by the system (after clicking on the Route button within the Workspace), the Map will show a Run that starts at the Depot, stops at the other three Stops along the way to pick up the assigned Students, and ends at the School where those Students are dropped off.

The Depot and the School are marked as  $\mathsf{P}$  and  $\mathsf{F}$  respectively on the Map.

Sequenced numbers are assigned to each Stop so that the directions of the Run are easy to follow.

### Saving The Run

Once Compass has solved a Run, you need to follow the appropriate steps to save it.

| 🛐 Schools    | Pref Barriers    | 會 Depots 《          | 🖻 Stops 🛛 📮      | 🕽 VIM 🛭 📽 Tie    | ring 🛢 Data   | ✓        | s 🗸 🔹 💄 SSD P   | ortal 🔹 Admin |
|--------------|------------------|---------------------|------------------|------------------|---------------|----------|-----------------|---------------|
| Routes Runs  | Stops Vehicle    | es Workspace        | Result Stude     | ents Action Req  | uests AVL     |          |                 |               |
| Reports      | Select a report. |                     |                  | T                |               |          | Run             |               |
| Show All Run | s   🖥 Save Resu  | lt Runs   🗙 Clear A | ll Runs   Move t | o Workspace   Ef | fective Date: | 🛗 Ap     | ply             |               |
| RESULTS (1)  | Click to v       | /iew list           |                  |                  |               |          |                 |               |
| ÷            | RUN              | VEHICLE NUMBER      | PROFILE          | EFFECTIVE DATE   | DURATION      | DISTANCE | START END       | STOPS         |
|              | 4692 AM          | 5B3111              | Default Profile  | •                | 01:36         | 35.51    | 7:15 AM 8:52 AM | 4 10          |

There are two groups of actions needed to Save a Run. These take place in different menus, the Stops List window and the Results menu. First, click on the Stops List icon within the Results screen, as it is explained in the <u>Understanding Results</u> tutorial.

#### WITHIN THE STOP LIST WINDOW

- Change the **Run#/Name**, which is automatically generated by the system, following the required conventions.
- Enter an **Effective Date**. If you try to save the Run without an Effective Date, a warning message will be displayed.
- Click on Apply Changes.
- Click on Close.

| un #/Name:  | 4692 AM  |  | Revision 13 o  | f  | 4692 AM R:12  | Туре:  |                                      | AM                              | •       |
|---|--|--|--|--|---|--|--------------------------------------|---------------------------------|---------|
| ehicle /<br>rofile:   | ×<br>5B3111  |  |  |  |   | Dead Head Mil  | es To:                               | 6.33                            | ¢       |
| Apply Run   | Stats.   |  |  |  |   | Dead Head Mil  | es Return:                           | 10.54                           | ¢       |
| un Billable:  |  |  |  |  |   | Number of Day  | s of Service:                        | 0                               | \$      |
| Do Not Crea   | ate Revision   |  |  |  |   |  |                                      |                                 |         |
| ffective Date:  | 6/3/2019   | ė  | Driver Sign-in   | time:  | <b></b>   |  |                                      |                                 |         |
|   | 6/28/201   | 9 🛗  | -  |  |   |  |                                      |                                 |         |
| nd Date:  | 6/20/201   | 9 📖  | Driver Sign-ou   | t  |   |  |                                      |                                 |         |
|   | 🖉 Mon 🖉  | Tue 🖉 Wed  | time:<br>7 Thu 🖉 Fri 🔲 Si  | at 🗐 Si                                      | un  |  |                                      |                                 |         |
| ctive Days:<br>otes:<br>DISMISSAL 3   |  | Tue 🗹 Wed 🖗  | time:<br>I Thu I Fri □ Si  | at 🗆 Si                                      | un  |  |                                      |                                 |         |
| otes:<br>DISMISSAL 3<br>Add To Stop   | 30PM   | fy User Arrive   |  |  |   | X Reset  |                                      |                                 |         |
| otes:<br>DISMISSAL 3<br>Add To Stop   | 30PM<br><u>stab</u>   Modif  | fy User Arrive   | 2 Thu  |  |   |  | /E TIME LOAD                         | D/UNLOAD TIME                   | (MIN)   |
| otes:<br>DISMISSAL 3<br>Add To Stop<br>TOPS FOR VEH   | 30PM<br><u>stab</u>   Modif  | fy User Arrive   | © Thu <sup>®</sup> Fri □ S.<br>e Times: <sup>®</sup> <u>Shift</u><br>DUP SAME STOPS<br>PTION / ADDRESS |  | and O Scale   |  | /E TIME LOAD                         | 1/UNLOAD TIME                   | (MIN)   |
| Add To Stop   | 30PM<br>s tab   Modif<br>IICLE: 5B3111 (1<br>Q Depot<br>t Q pick up  | Ty User Arrive<br>o) GRC<br>STOP DESCRIF<br>DURHAM-PET   | © Thu <sup>®</sup> Fri □ S.<br>e Times: <sup>®</sup> <u>Shift</u><br>DUP SAME STOPS<br>PTION / ADDRESS | DIST.  | and Scale   | ME USER ARRIV  | /E TIME LOAD                         |                                 | (MIN)   |
| otes:<br>DISMISSAL 3<br>Add To Stop<br>TOPS FOR VEH<br>10<br>1<br>2<br>3151545  | 30PM<br>s tab   Modif<br>IICLE: 5B3111 (1<br>Q Depot<br>Q pick up<br>Q pick up   | Ty User Arrive<br>o) GRC<br>STOP DESCRIP<br>DURHAM-PET<br>GERMANTOW  | Thu  Fri □ S. Times:  Shift UP SAME STOPS TION / ADDRESS   | Exp<br>DIST.                                 | and Scale SYS. ARRIVE TH 0715 AM  | ME USER ARRIV<br>5:59 AM   |                                      | min                             | (MIN)   |
| otes:<br>DISMISSAL 3<br>Add To Stop<br>TOPS FOR VEF<br>1<br>2<br>3151545<br>4<br>3051954  | 30PM<br>s tab   Modif<br>IICLE: 5B3111 (1<br>Q Depot<br>Q Dick up<br>pick up<br>pick up<br>2 Q pick up   | Ty User Arrive<br>o) GRC<br>STOP DESCRIF<br>DURHAM-PET<br>GERMANTOW<br>11TH ST & LOU<br>32ND ST & CU   | Times: Shift   | DIST.<br>6.33<br>2.56<br>4.5                 | and Scale<br>Sys. ARIVE TII<br>0715 AM<br>0737 AM<br>0744 AM<br>0753 AM             | ME USER ARRIV<br>5:59 AM<br>6:20 AM                                  | 0.00                                 | min<br>min<br>min               | : (MIN) |
| otes:<br>DISMISSAL 3<br>Add To Stop<br>TOPS FOR VEF<br>1<br>2<br>3<br>3<br>3151545<br>4<br>3051956<br>5<br>3148441  | 30PM<br>s tab   Modif<br>IICLE: 5B3111 (1<br>Q Depot<br>Q Depot<br>Q pick up<br>pick up<br>Q pick up<br>Q pick up  | Ty User Arrive<br>o) GRC<br>STOP DESCRIF<br>DURHAM-PET<br>GERMANTOW<br>11TH ST & LOU<br>32ND ST & CU<br>30TH ST & DIA                                    | Times: Shift   | DIST.<br>6.33<br>2.56<br>4.5<br>0.51         | and Scale<br>SYS. ARRIVE TII<br>0715 AM<br>0737 AM<br>0744 AM<br>0753 AM<br>0754 AM | ME USER ARRIV<br>5.59 AM<br>6.20 AM<br>6.32 AM                       | 0.00<br>0.00<br>0.00<br>0.00         | min<br>min<br>min               | (MIN)   |
| otes:<br>DISMISSAL 3<br>Add To Stop<br>TOPS FOR VEF<br>1<br>2<br>3<br>3<br>3<br>3<br>3<br>3<br>3<br>15<br>4<br>3<br>3<br>3<br>15<br>4<br>3<br>3<br>3<br>15<br>4<br>3<br>3<br>15<br>15<br>15<br>15<br>15<br>15<br>15<br>15<br>15<br>15 | 30PM<br>stab   Modif<br>IICLE: 5B3111 (1<br>Q Depot<br>Q Depot<br>Q pick up<br>pick up<br>Q pick up<br>Pick | y User Arrive<br>o)  | Times: Shift   | DIST.<br>6.33<br>2.56<br>4.5<br>0.51<br>0.52 | and Scale<br>Sys. ARRIVE TII<br>0715 AM<br>0737 AM<br>0737 AM<br>0753 AM<br>0756 AM | ME USER ARRIV<br>5.59 AM<br>6.20 AM<br>6.32 AM<br>6.54 AM            | 0.00<br>0.00<br>0.00<br>0.00<br>0.00 | min<br>min<br>min<br>min        | (MIN)   |
| otes:<br>DISMISSAL 3<br>Add To Stop<br>TOPS FOR VEF<br>1<br>2<br>3<br>3<br>3151545<br>4<br>3051956<br>5<br>3148441  | 30PM stab   Modif IICLE: 5B3111 (1 Q Depot Q pick up   | Ty User Arrive<br>o) GRC<br>STOP DESCRIF<br>DURHAM-PET<br>GERMANTOW<br>11TH ST & LOU<br>32ND ST & CU<br>30TH ST & DIA<br>25TH ST & RID<br>51ST ST & MASS | Times: Shift   | DIST.<br>6.33<br>2.56<br>4.5<br>0.51<br>0.52 | and Scale<br>SYS. ARRIVE TII<br>0715 AM<br>0737 AM<br>0744 AM<br>0753 AM<br>0754 AM | ME USER ARRIV<br>5.59 AM<br>6.20 AM<br>6.32 AM<br>6.54 AM<br>6.57 AM | 0.00<br>0.00<br>0.00<br>0.00         | min<br>min<br>min<br>min<br>min | (MIN)   |

#### WITHIN THE RESULTS SCREEN

• When the Results menu is displayed after you close the Stops List window, click on the Save Results Run button.

| 🔒 Schools    | <b>P</b> Barriers | 🎓 Depots          | Stops           |            | 🕻 Tiering      | 🛢 Data 🗸 | 🖌 💼 Repo | rts 🗸 🖌 | SSD Portal | 🌣 Admir |
|--------------|-------------------|-------------------|-----------------|------------|----------------|----------|----------|---------|------------|---------|
| Routes Runs  | Stops Vehicle     | es Workspace      | Result Stud     | ents Actio | n Requests     | AVL      |          |         |            |         |
| Reports      | Select a report.  |                   |                 | •          |                |          |          | Rur     | 1          |         |
| Show All Run | is 🖥 Save Resul   | lt Runs 🗙 Clear A | All Runs   Move | to Workspa | ce   Effective | e Date:  | Ē        | Apply   | _          |         |
| RESULTS (2)  |                   |                   |                 |            |                |          |          |         |            |         |
| •            | RUN               | VEHICLE NUMBER    | PROFILE         | EFFECTIVE  | DATE D         | URATION  | DISTANCE | START   | END        | STOPS   |
| ÷            |                   |                   |                 |            |                |          |          |         |            |         |

### NOTE: New Stop List Icon

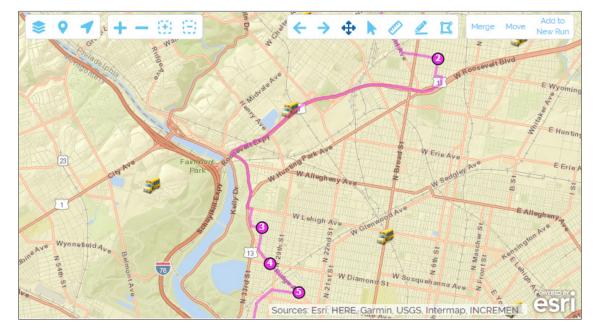
Observe that the Results table shows a new Stops List icon after applying the previous changes. You can check and edit the Run by clicking on the new Stops List icon to disclose its information details.

### Viewing a Run

Sometimes users may want to check a previously generated Run. If you want to View an existing Run:

- 1. Click on the **Runs** tab in the toolbar.
- 2. If you know it, enter the **Run#/Name** in its text box, on the upper right group of search filters. You can always use the other filters, such as Schools or Depots, to search for the Run.
- 3. Click Find. The Run will be displayed in the Runs Search Results table below.

| Schools<br>5996<br>0596   | ·                     | Result Students                   | Action Requests AVL | ne: 4692 AM             | _2             |
|---|-----------------------|-----------------------------------|---------------------|-------------------------|----------------|
| 3901         5920         SCHOOL         Run(s) Effective Period:         Run(s) Starting On: | -                     | A1 SCHOOL BUS                     | #:<br>Street:       |                         |                |
| Show All Revisions  | only Unassigned Runs  | Use Geofence                      |                     |                         |                |
| Find Clear Filters  | Clear Results         | Available<br>Reports: Select a re | port.               | •                       | View Report    |
| Check All Runs   Move to<br>RUNS SEARCH RESULTS (1)   | Workspace   Mirror to | Workspace   Edit Run              | Show Arrows   Expo  | t to Scenario   Shift 1 | Fime .         |
|   | UN REVISION           | ROUTE EFFECTIVE                   | E DATE END DATE     | DRIVER SIGN-IN          | DRIVER SIGN-OU |
|   | 692 AM 12             | 05/14/201                         | 0                   |                         |                |



4. Select its corresponding box. The Run will also be disclosed on the Map.

### Editing the Run Sequence

Occasionally, users may need to change the sequence of their Runs for various reasons. For example, Students with special needs might require more time to get ready for Pick Up and the user could decide to change the sequence number of the Stops in that Run to better suit those Students' needs.

You may be in two different situations when you want to change the sequence of a Run. Let's see how to proceed in each of them.

#### If the system has just solved the Run and you are still in the Results menu:

- 1. Select the **Run** by clicking its corresponding box.
- 2. Click Move to Workspace to move the Run to the Workspace.

| 🔒 Schools   | 🚧 Barriers                             | 🎓 Depots         | 🐵 Stops 🛛 🕻    | 🕽 VIM 🛭 📽 Tieri  | ng 🛢 Data 🗸       | 💼 Reports 🗸 | 💄 SSD Portal | 🌣 Admin |
|-------------|--|------------------|----------------|------------------|-------------------|-------------|--------------|---------|
| Routes Runs | Stops Vehicles                         | Workspace        | Result Stude   | ents Action Requ | iests AVL         |             |              |         |
| Reports     | Select a report.<br>Is   🖶 Save Result | Runs   🗙 Clear A | All Runs Move  | to Workspace Eff | 2<br>ective Date: | Apply       | Run          |         |
| RESULTS (1) |  |                  |                |                  |                   |             |              |         |
| ÷           | RUN                                    | VEHICLE NUMBER   | PROFILE        | EFFECTIVE DATE   | DURATION          | DISTANCE ST | ART END      | STOPS   |
| 🗹 😭 🚖 📕     | YB 18-00-R                             | YB 18-00         | Default Profil | e                | 01:48             | 67.58 4:0   | 0 AM 5:48 AM | 9       |
|             |  |                  |                |                  |                   |             |              |         |

Α

- 3. Proceed to the Workspace by clicking the **Workspace** tab.
- 4. Click the **Stop List** icon on the left. The Stop List window appears.

| I <b>A</b> I S | chools  | <b>P</b> Barriers   | 🎓 Depots        | Stops 🐨    | s 😭 VIM         | 🐨 Tierir     | ng 🛢 Data 🗸            | 📋 Repo  | orts 🗸  | SSD Portal | l 🌼 Admin |
|----------------|---------|---------------------|-----------------|------------|-----------------|--------------|------------------------|---------|---------|------------|-----------|
| Routes         | Runs    | Stops Vehicles      | Workspace       | Result     | Students        | Action Reque | ests AVL               |         |         |            |           |
| Solve          | Runs    | Unassign all stop:  | s   Clear Works | bace       | -3              |              |                        |         |         |            | ≽         |
| Unassi         | gned St | ops in Workspace: ( | 0               |            |                 |              |                        |         |         |            |           |
| ROUTI          | NG PLAN | (1 VEHICLE(S))      |                 |            |                 |              |                        |         |         |            |           |
|                | RUN     | VEHICLE NUMBE       | R VEHICLE       | CONF. TYPE | PROFILE         | STOPS        | ASSIGNMENT RULE        | AFTER   | BEFORE  | DEPOT      | TIME      |
| <b>• ••</b>    |         | YB 18-00            |                 |            | Default Profile | 9 1          | - Preserve Stop Assign | 4:00 AM | 6:00 PM | ASPIRA     | 7         |
|                | -4      |                     |                 |            |                 |              |                        |         |         |            |           |
| 4              |         | •                   |                 |            |                 |              |                        |         |         |            |           |

- 5. Select the **Stop** you want to change by clicking its corresponding box.
- 6. Click the **Up** or **Down** arrow button on the upper left corner or the window to move the Stop to the preferred position in the list. By doing so, you will establish the appropriate Stop sequence.
- 7. Click on the **Apply Changes** button.
- 8. Click Close.

| то | PS F      | OR VEH     | ICLE: YB | 18-0 | 00 (9)  | GROUP SAME STOPS                    |       |                        |               |     |             |  |
|----|-----------|------------|----------|------|---------|-------------------------------------|-------|------------------------|---------------|-----|-------------|--|
|    |           | SEQ.# II   | C        |      |         | STOP DESCRIPTION / ADDRESS          | DIST. | LOAD/UNLOAD TIME (MIN) | CURB APPROACH | DLY | TIME WINDOW |  |
| L  |           | 1          |          | 9    | Depot   | ASPIRA                              |       |                        |               | DA  |             |  |
| 2  | ◄         | 2 <u>3</u> | 202697   | Q    | pick up | 271 Schuylkill Rd Phoenixville 1946 | 0     | 1.00 min 5             | ES            | DA  | -           |  |
| 3  |           | 3 <u>3</u> | 202695   | Q    | pick up | 150 Nutt Rd Phoenixville 19460      | 0     | 1.00 min               | ES            | DA  | -           |  |
| ļ  |           | 4 3        | 202694   | Q    | pick up | 565 Nutt Rd Phoenixville 19460      | 0     | 1.00 min               | ES            | DA  | -           |  |
| 5  |           | 5 <u>3</u> | 202693   | Q    | pick up | 101 Buchanan St Phoenixville 19460  | 0     | 1.00 min               | ES            | DA  | -           |  |
| 3  |           | 6 3        | 202692   | Q    | pick up | 329 Bridge St Phoenixville 19460    | 0     | 1.00 min               | ES            | DA  | -           |  |
| 7  |           | 7 3        | 202691   | Q    | pick up | 100 Bridge St Phoenixville 19460    | 0     | 1.00 min               | ES            | DA  | -           |  |
|    | $\square$ | • •        | 00060    | 0    | niekun  | 610 Stars St Dhooningillo 10460     | 0     | 1.00 min               | EC            | D.4 |             |  |

B

If you need to find an existing Run to edit its sequence:

- 1. Click on the **Runs** tab.
- 2. Enter the Run#/Name on the upper right group of search filters.

You can always use the other filters, such as Schools or Depots, to search for the Run.

- 3. Click Find.
- 4. Select the appropriate **Run**.

**These are the same steps** explained in the <u>Viewing a Run</u> section above. Once the Run is selected, repeat steps 2-8 explained for the first situation, when the system has just solved the Run and you are still in the Results menu (**A**).

Finally, to have a better overall understanding of these workflows, let's take a look at the Map and see how the resulting changes are displayed:



This generated Run (colored in red) shows the following sequence:

The bus leaves the Depot (P) to pick up a Student at Stop #2 first, (which is farther than Stop #3) and then it returns to Stop #3 and continues to Stop #4 to finally reach the School (F).



A newly modified Run (colored in blue) shows a different sequence:

The bus leaves the Depot (P) to pick up the Student that lives closer at Stop #2 (previously #3) following a different path, and then proceeds to pick up the rest of them at Stops 3 and 4 before reaching the School (F).

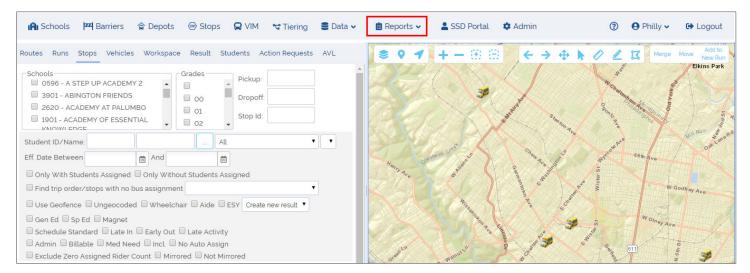
# **COMPASS REPORTS**

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### **COMPREHENSIVE REPORTS**

### **Compass Reports Module**

The Reports module allows Compass users to create, edit, export and print several types of Report. To access the module, log in to Compass Route Builder, find the **Reports** tab in the tool bar and click on it. Then, select Compass Reports from the drop-down menu.



### **Creating Comprehensive Student Reports**

#### **Access Comprehensive Students Reports**

Once the Reports module becomes available, find the Students drop-down menu and click on it. This holds the Comprehensive Students Report tool. To create this report:

- 1. Click on the **Students** drop-down menu.
- 2. Click Comprehensive Students.



#### **Information Input and View Options**

- Enter the information in the Required Fields. These fields show a Required tag highlighted in red underneath the text box and a star next to the name of the field. Data for these fields, such as scenarios or schools, is loaded from Compass Route Builder. Some fields, including the required fields, work as drop-down menus that show all the available options. If necessary, you can also manually enter additional information in other fields.
- 2. You can paginate your Comprehensive Student Reports by clicking **Paginated Display** as an Additional View Option.

| Scenario *   | Report Date *                    |         |
|--|----------------------------------|---------|
| _  | - ·                              | <b></b> |
| Required   | Required                         |         |
| Run (Number)   |                                  |         |
| Schools *  |                                  |         |
| Required   | Required                         | Fields  |
| No data on Server  |                                  |         |
| District Fields  | Grade                            |         |
| No data on Server  | No data on Server                |         |
|  | No data on Server                |         |
|  | Student Last Name                |         |
| Student First Name   |                                  |         |
| Student First Name   |                                  |         |
| Student First Name Student ID Student Type Stop and Run Assignment | Student Last Name                | ·       |
| Student First Name Student ID Student Type                         | Student Last Name Student Status | •       |

3. Click the **View Report** button below to generate your Report.

| •      |
|--------|
| ×      |
|        |
| Status |
| Ŧ      |
|        |
|        |

### **Understanding Comprehensive Student Reports**

The Comprehensive Students Report contains the following sections:

- 1. The first section shows specific information about the Student. This includes:
  - Student ID and Name.
  - School and Grade.
- 2. Two more sections show information about Pick Up and Drop Off Runs. This information includes:
  - Pick Up and Drop Off Run codes, addresses and Time. Pick Up and Drop Off Time represent the time window before and after Time Bells at School respectively.
  - Vehicle assigned to Pick Up and Drop Off Runs.
  - Distance to Pick Up and Drop Off Stops.
  - Routes in which Pick Up and Drop Off Runs are included.

| Η       |  | Q C    |       | 4  | 1 / 1                      | .21                 | •       |          |                     |       |                           |                     |  | Star                | ndaro | d Versi         | on |
|---------|--|--------|-------|--|----------------------------|---------------------|---------|----------|---------------------|-------|---------------------------|---------------------|--|---------------------|-------|-----------------|----|
| Stu     | Student Section Comprehensive Student Report |        |       |  |                            |                     |         |          |                     |       |                           |                     |  |                     |       |                 |    |
|         |  | ooodor |       | Report Date : 01/02/2017<br>Pick Up & Drop Off |                            |                     |         |          |                     |       |                           |                     |  |                     |       |                 |    |
|         |  |        |       | _  | Pick Up                    | -                   |         |          |                     |       | Drop Off                  |                     |  |                     |       |                 |    |
| D       |  |        | Grade | Run  | Address                    |                     |         |          | Distance<br>To Stop | Route | Address                   |                     |  | Distance<br>To Stop |       | District Fields |    |
| 5947730 |  |        | 08    |  | 4801 W.<br>GIRARD<br>A/E.  | -                   |         |          | м                   |       | 79TH ST /<br>OGONTZ       | 4:05 PM-<br>4:10 PM |  | м                   |       |                 |    |
|         |  |        |       |  |                            |                     |         |          |                     |       | 4801 W.<br>GIRARD         | -                   |  | м                   |       |                 |    |
| 5947730 |  |        | 08    | 7582 AM  | 79TH ST /<br>OGONTZ<br>AVE | 7:25 AM-<br>7:30 AM | 7582 AM | YB 8-864 | м                   |       | 79TH ST /<br>OGONTZ       | 4:05 PM-<br>4:10 PM |  | м                   |       |                 |    |
|         |  |        |       |  |                            |                     |         |          |                     |       | 4801 W.<br>GIRARD         | -                   |  | M                   |       |                 |    |
| 5961853 |  |        | 07    |  | 4801 W.<br>GIRARD<br>A/E.  | -                   |         |          | м                   |       | 4801 W.<br>GIRARD<br>2015 | -                   |  | м                   |       |                 |    |
|         |  |        |       |  |                            |                     |         |          |                     |       | 29TH ST /<br>NORRIS ST    | 4:05 PM-<br>4:10 PM |  | м                   |       |                 |    |
| 5961853 |  |        | 07    | 7582 AM  | 29TH ST /<br>NORRIS ST     | 7:25 AM-<br>7:30 AM | 7582 AM | YB 8-864 | м                   |       | 4801 W.<br>GIRARD<br>44F  | -                   |  | M                   |       |                 |    |

You can also generate a paginated version if you click Paginated Display before viewing the report.

| 💾 🚍 🔍 🤁 ┥        | Paginated Version   |                     |              |                  |        |                              |                |                  |  |
|------------------|---------------------|---------------------|--------------|------------------|--------|------------------------------|----------------|------------------|--|
|                  |                     |                     |              |                  |        |                              |                |                  |  |
|                  | School              |                     |              | Grade            |        |                              | n #            |                  |  |
|                  | 1.00.20070-F10000   |                     |              | 08               |        |                              |                |                  |  |
|                  | Pick Up Information |                     |              |                  |        |                              |                |                  |  |
| Pick up Time     | P                   | Pick Up Address     |              | p Vehicle        | Distan | ce To Pick Up<br>Stop        | Pick Up Run    | Pick Up Route #  |  |
| 7:25 AM- 7:30 AM | ALGON               | AVE / FRIENDSHIP ST | YB 20        | YB 20-516003     |        |                              | 7615 AM        |                  |  |
|                  |                     | D                   | rop Off Info | rmation          |        |                              |                |                  |  |
| Drop Off Time    |                     | Drop Off Address    |              | Drop Off Vehicle |        | Distance to Drop<br>Off Stop | Drop Off Run # | Drop Off Route # |  |
| 4:05 PM- 4:10 PN | ALGON AVE / FRIENDS |                     |              |                  |        |                              |                |                  |  |

### Creating Comprehensive Stops, Run and Route Reports

#### Access Comprehensive Stops, Run and Route Reports

The Runs drop-down menu holds the Comprehensive Route, Run and Stops Report tools. To create these Reports:

- 1. Click on the Runs drop-down menu.
- 2. Choose the Comprehensive Report you want to create, i.e., **Comprehensive Stops, Comprehensive Run** or **Comprehensive Route**, and click on it. All of them show the same comprehensive report icon.



#### **Information Input and View Options**

- Enter the information in the Required Fields. These fields show a Required tag highlighted in red underneath the text box and a star next to the name of the field. Data for these fields, such as Scenarios or Schools, is loaded from Compass Route Builder. Some fields, including the required fields, work as drop-down menus that show all the available options. If necessary, you can also manually enter additional information in other fields.
- 2. You can select Additional View Options before viewing your Reports.
- 3. You can create Comprehensive Stop Reports with more detailed Student information presented in additional rows by clicking the **Show Student Information** button.

| Comprehensive Stop Report                |   |
|--|---|
| Scenario *                               | Report Date *                           |
| 2017-2018[SY]                            | • · · · · · · · · · · · · · · · · · · · |
| Route (Name / Number)                    | Required Run (Number)                   |
| Stop name                                |   |
| Schools *                                |   |
| +  | Required Fields                         |
| Required                                 |   |
| Run and Route Assignment                 | Student Assignment                      |
| · · ·                                    | ·                                       |
| Show Student Information Additional View | Options                                 |

4. You can also **Show Directions** and **Student Information**, or **Include Map** in your reports by clicking the corresponding buttons on the lower-left corner of the Comprehensive Run and Route Report dialogs.

| Comprehensive Route Report               |                         |
|--|-------------------------|
| Scenario *                               | Report Date *           |
| 2017-2018[SY]                            |                         |
|  | Required                |
| Route (Name / Number)                    | Run (Number)            |
|  |                         |
| Schools*                                 |                         |
|  |                         |
| Required                                 |                         |
| Vehicles                                 | Depots                  |
|  |                         |
|  | Required                |
| Show Directions Show Student Information |                         |
|  | Required Fields         |
| Include Map                              |                         |
|  | Additional View Options |
| View Report                              |                         |

### **View Report**

Click View Report below to generate your Report.

| Comprehensive Route Repo  | rt                                    |
|---------------------------|---------------------------------------|
| Scenario *                | Report Date *                         |
| 2017-2018[SY]             | · · · · · · · · · · · · · · · · · · · |
|                           | Required                              |
| Route (Name / Number)     | Run (Number)                          |
| Schools *                 |                                       |
| Required                  |                                       |
| Vehicles                  | Depots                                |
|                           |                                       |
|                           | Required                              |
| Show Directions Show Stud | dent Information                      |
| Include Map               |                                       |
| View Report               | port                                  |

### Understanding Comprehensive Stop Reports

The Comprehensive Stops Report document displays two different sections:

- 1. The first section contains specific information about the Stop. This includes:
  - Run and Route codes.
  - · Revision and number of students assigned to the stop.
  - Special equipment (if required).
  - Vehicle code.
- 2. A second section displays a table showing student information. This section is visible only if you select the option Show Student Information before viewing the report. Student Information includes:
  - Student ID.
  - Student Name.
  - Grade and Genre
  - Emergency Number.
  - Residence Address.
  - Attending School.
  - Special Needs.

|   | i 🔍 🕑 <         |     | 1   | / 3                | 7                        |                     |               |  |  |
|---|-----------------|-----|-----|--------------------|--------------------------|---------------------|---------------|--|--|
| Comprehensive Stop Report<br>Report Date: 09/25/2018                            |                 |     |     |                    |                          |                     |               |  |  |
| Stop Id: 2380893     Stop Name: NW LAKESHORE AVE & NW 99TH ST                   |                 |     |     |                    |                          |                     |               |  |  |
| Run : COLR02PM     Revision: 7       Route: 151     Student Assigned To Stop: 4 |                 |     |     |                    |                          |                     |               |  |  |
| Special Eq  | uipment:        |     |     |                    |                          |                     | Vehicle: 151  |  |  |
| ld  | Name            | Gra | Gen | Emer<br>Number     | Residence<br>Address     | Attending<br>School | Special Needs |  |  |
| 000124239   | BLAKE BRYAN     | 12  | м   | (360) 936-<br>2388 | 3014 NW 97TH CIR         |                     |               |  |  |
| 000178019   | CAROLINE HANSEN | 09  | F   | (360) 901-<br>1189 | 3101 NW 97TH CIR         |                     |               |  |  |
| 000120050   | MAKENNA JOHN    | 12  | F   | (360) 576-<br>0394 | 9712 NW 31ST AVE         |                     |               |  |  |
| 000135389   | ROAN TANOTO     | 09  | м   | (360) 984-<br>5272 | 9018 NW STARKREST<br>AVE |                     |               |  |  |

### Understanding Comprehensive Run Reports

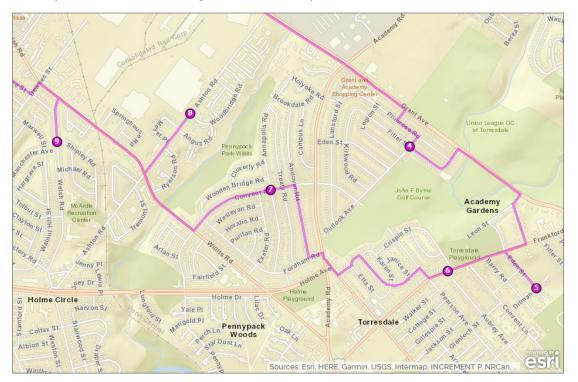
The Comprehensive Run Report contains three different sections.

- 1. The first section shows information about the Run that includes:
  - Run ID and Vehicle code and Run Revision.
  - Depot assigned.
  - Effective Date, End Date and Duration.
  - Total number of Stops in the Run and Total number of Students.
  - List of Schools included in the Run.

| ₿₿              | 9. C 4      | 1    | / 17      |                  |                     |  |
|-----------------|-------------|------|-----------|------------------|---------------------|--|
|                 |             | Comp |           | ive Run Rep      | ort                 |  |
|                 |             |      | Report Da | ite: 06/19/2019  |                     |  |
| RUN             | 4208 AM     |      |           | Depot            | PHILLY TRANS-TACONY |  |
| Vehicle         | 9B676       |      |           | Effective Date   | 10/24/17 12:00 AM   |  |
| Run Revision    | 5           |      |           | End Date         |                     |  |
| Distance        | 25.79 miles |      |           | Duration         | 71 minutes          |  |
| First/Last Dist | 0 miles     |      |           | First-Last Durat | 72 minutes          |  |
| Total Stops     | 17          |      |           | Total Pupils     | 24                  |  |
| List of Schools |             |      |           | ALC: NO          |                     |  |

- 2. The second section shows information about each Stop included in the Run:
  - Stop ID and Address.
  - Number of Students Picked Up and Dropped Off at the Stop, and Total Onboard.
  - Time planned for that Stop.
- 3. A third section displays a table showing detailed information about the Students assigned to each Stop of the Run. This section will be visible only if you select the option Show Student Information before viewing the report. This information includes:
  - Student's ID, Name, Grade, Genre, Emergency Number and Address.
  - Attending School.
  - Special Needs.

| 3. Stop Id: | 3. Stop Id: 2380546 - NW 12TH AVE & NW 80TH ST AT: 02:17:00 PM |     |     |                    |  |                      |               |   |  |
|-------------|--|-----|-----|--------------------|--|----------------------|---------------|---|--|
| Picked Up:  | Picked Up: 0 - Dropped Off: 13 - Total Onboard: 187            |     |     |                    |  |                      |               |   |  |
| ld          | Name   | Gra | Gen | Emer<br>Number     | Residence<br>Address                           | Attending<br>School  | Special Needs |   |  |
| 000134216   |  | 09  | F   | (380) 835-<br>3007 | 1112 NW 79TH CIR                               | COLUMBIA RIVER<br>HS |               |   |  |
| 000171287   |  | 09  | м   | (208) 244-<br>4507 | 8004 NW 11TH CT                                | COLUMBIA RIVER<br>HS |               |   |  |
| 000118435   | *****  | 12  | F   | (360) 571-<br>5771 | 7913 NW 11TH CT                                | COLUMBIA RIVER<br>HS |               | 3 |  |
| 000119392   | 1000100-001  | 12  | м   | (360) 433-<br>0798 | 8212 NW 12TH AVE                               | COLUMBIA RIVER<br>HS |               |   |  |
| 000171268   |  | 12  | F   | (208) 244-<br>4507 | 8004 NW 11TH CT                                | COLUMBIA RIVER<br>HS |               |   |  |
| 000159532   | 10010-000110   | 09  | м   | (360) 839-<br>4947 | 1406 NW GREGORY DR<br>VANCOUVER 98885-<br>6036 | COLUMBIA RIVER<br>HS |               |   |  |



4. If you choose the option **Include Map** before viewing the report, you will also get a map of the Run located between sections 1 and 2. This map shows numbers indicating the order of the Stops included in the Run.

# Understanding Comprehensive Route Reports

The **Comprehensive Route Report** document contains **Route** information pages and more detailed **Run** information pages. The Run information pages also show details about each **Stop**.

### **Route Information**

The Route information pages display two different sections:

1. The first section includes the report header followed by Route name, Effective Date, Depot and Vehicle assigned to the Route.

|                         |                                | 130   |             |   |
|-------------------------|--------------------------------|---|-------------|---|
|                         | · · · · ·                      | nsive Route Rej<br>ate: 06/19/2019 03:40 PM | port        |   |
| ROUTE<br>Effective Date | 0151<br>09/07/2018 12:00:00 AM | Garage/Depot<br>Vehicle                     | Yard<br>151 | • |

2. The second section lists the Runs included in the Route and their specific IDs, First and Last Stop times, number of stops, deadhead duration and mileage, and total number of students, followed by school name, arrival times and duration.

| Run                  | COLR02AM         |                   |                   |
|----------------------|------------------|-------------------|-------------------|
| UAT First Stop       | 06:10:00 AM      | User Deadhead Du  | iration 0 minutes |
| UAT Last Stop        | 07:00:00 AM      | Deadhead Mileage  | 21.71 miles       |
| Total Stops          | 137              | Total Pupils      | 208               |
| FIRST STOP 6:25 - BI | E AT SCHOOL 6:55 |                   |                   |
| Schools Na           | ame              | User Arrival Time | Duration          |
| COLUMBIA RIV         | ER HS            | 06:55:00 AM       | 42 minutes        |
|                      |                  |                   |                   |
| Run                  | MGAM3004         |                   |                   |
| UAT First Stop       | 07:03:00 AM      | User Deadhead Du  | ration 26 minutes |
| UAT Last Stop        | 07:25:00 AM      | Deadhead Mileage  | 20.87 miles       |
| Total Stops          | 14               | Total Pupils      | 0                 |
| WALKER               |                  |                   |                   |
| Schools Na           | ame              | User Arrival Time | Duration          |
| COLUMBIA RIV         | ER HS            | 07:03:00 AM       | 10 minutes        |
| SKYVIEW I            | IS               | 07:25:00 AM       | 26 minutes        |

### **Run Information**

The Run information pages can have different sections depending on the options you choose before viewing the document.

- 1. The first section shows information about the Run that includes:
  - Run ID.
  - Vehicle ID.
  - Schools and total number of Stops included in the Run.
  - Duration.
  - Route name and Depot.
  - Distance between first and last Stops and total distance.
  - Total number of Students.

|                  | 🤇 😋 4 4             | 2 / | 130 |                 |             |  |
|------------------|---------------------|-----|-----|-----------------|-------------|--|
| RUN              | COLR02AM            |     |     |                 |             |  |
| Vehicle          | 151                 |     |     | Route Name      | 0151        |  |
| List of Schools  | 450                 |     |     | Garage/Depot    | Yard        |  |
| Run Revision     | 6                   |     |     | First/Last Dist | 0 miles     |  |
| First/Last Dur U | minutes             |     |     | Total Distance  | 21.71 miles |  |
| Total Durat U    | 50 minutes          |     |     | Total Pupils    | 208         |  |
| Total Stops      | 137                 |     |     |                 |             |  |
| FIRST STOP 6:25  | - BE AT SCHOOL 6:55 |     |     |                 |             |  |

- 2. The second section shows information about each Stop included in the Run (see next page):
  - Stop address and ID.
  - Number of students picked up and dropped off at the Stop.
  - Time planned for that Stop.

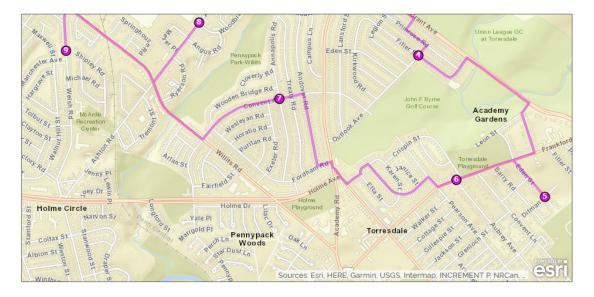
3. A third section displays a table showing detailed information about the Students assigned to each Stop of the Run. This section will be visible only if you select the option Show Student Information before viewing the report.

This information includes:

- Student's ID, Name, Grade and Gender.
- Emergency Number.
- Residence Address.
- Attending School.
- Special Needs.
- Effective Date and End Date.
- Total Onboard Students.
- 4. A fourth section shows the directions planned for that Run. This section will be visible only if you select the option Show Directions before viewing the report.

| 15. NW 2      | 26TH AV @ NW 1121      | TH S    | T_      |                       |                      |                     |                 | Stop Id 2                     | 378845                        |
|---------------|------------------------|---------|---------|-----------------------|----------------------|---------------------|-----------------|-------------------------------|-------------------------------|
|               | p: 10 Dropped Off: 0   |         |         |                       |                      |                     |                 | AT: 06:25                     | :00 AM                        |
| ld            | Name                   | Gr<br>a | G<br>en | Emer<br>Num           | Residence<br>Address | Attending<br>School | Special Needs   | Effe<br>Date                  | End<br>Date                   |
| 00014763<br>8 |                        | 09      | м       | (380)<br>580-<br>8244 | 11116 NW 26TH AVE    |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00017214<br>4 | 1.000                  | 11      | м       | (907)<br>727-<br>1513 | 2405 NW 112TH ST     |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00013727<br>4 | 1                      | 10      | м       |                       | 11513 NW 27TH AVE    |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00011802<br>5 | 10.000                 | 12      | F       | (317)<br>900-<br>0823 | 2409 NW 112TH ST     |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00012231<br>9 |                        | 10      | м       | (380)<br>548-<br>1603 | 11212 NW 24TH AVE    |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00012838      |                        | 10      | м       | (380)<br>896-<br>3048 | 11218 NW 25TH CT     |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00013490<br>5 | *********              | 11      | м       | (386)<br>307-<br>4173 | 2418 NW 112TH ST     |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00016769<br>7 | -                      | 11      | м       | (380)<br>574-<br>5442 | 2510 NW 115TH ST     |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00013453<br>1 | 10110-0014-001         | 09      | F       | (380)<br>904-<br>4857 | 11212 NW 24TH AVE    |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| 00014154<br>4 | 1.01.000               | 11      | м       | (971)<br>254-<br>6146 | 2605 NW 115TH ST     |                     |                 | 07/27/201<br>8 12:00:00<br>AM | 01/01/000<br>1 12:00:00<br>AM |
| Tota          | I Onboard: 140         |         |         |                       |                      |                     |                 |                               |                               |
| 1 Cont        | tinue east on NW 112th | n St    |         |                       |                      |                     | go ~ 0.01 miles |                               |                               |
| 3 Turn        | right on NW 26th Ave   |         |         |                       |                      |                     | go ~ 0.13 miles |                               |                               |
| 5 Turn        | right on NW 109th St   |         |         |                       |                      |                     | go ~ 0.04 miles |                               |                               |

5. If you choose the option **Include Map** before viewing the report, you will also get a map of the Run located between sections 1 and 2. This map shows numbers indicating the order of the Stops included in the Run.



### Viewing, Navigating and Exporting Comprehensive Reports

When you click on the **View Report** button you will find the Report Navigation Tools (export, print, zoom, refresh and page navigating buttons) on top of the report.



You can export your Reports to several formats. To export a Report:

- 1. Click the **Export** button.
- 2. Select the preferred format.



### **PLANNED VS ACTUAL REPORTS**

Since users may want to monitor the performance of bus operators and their observance of schedule when servicing student transportation routes, Compass provides the option to generate **Planned vs Actual** reports that include originally planned schedules and data received from GPS/AVL showing actual arrival times at both Schools (Planned vs Actual at Schools ) and bus Stops (Planned vs Actual at Stops).

These reports allow customers to detect deviations from scheduled times in order to determine the compliance of the service providers.

### Generating Planned vs Actual Reports

If you want to generate these reports, log in into Compass Route Builder and access the Reports module by clicking on its corresponding tab. Once the module is displayed, click on AVL/GPS Mobile and select the type of report to be generated, i.e. Planned vs Actual at Schools or Planned vs Actual at Stops.

When the Planned vs Actual at Schools Report tool is displayed:

- 1. Select a Scenario.
- 2. Select Start and End dates.
- Enter Run number (code) if needed. Notice that this is not a required field if you select a specific school below.
- 4. Select School. This is not a required field if you select a specific Run above.
- Select Arrival Status if needed. This can be early, on time, late or skipped. It is considered skipped if the vehicle is more than 30 minutes late or it never arrives.
- 6. Click on View Report.

| Planned vs Actual At Schools Report |                |  |
|-------------------------------------|----------------|--|
| Scenario                            |                |  |
| 2018-2019[SY]                       | •              |  |
| Start Date                          | End Date       |  |
| 19-June-2019                        | 🗎 19-June-2019 |  |
| Run (Number) *                      |                |  |
|                                     |                |  |
| Required                            |                |  |
| Schools                             |                |  |
|                                     |                |  |
| Required                            |                |  |
| Arrival Status                      |                |  |
|                                     |                |  |

When the Planned vs Actual at Stops Report tool is displayed:

- 1. Make Select a Scenario.
- 2. Select Start and End dates.
- 3. Enter Run number (code).
- 4. Select Arrival Status if needed. This can be early, on time, late or skipped. It is considered skipped if the vehicle is more than 30 minutes late or it never arrives.
- 5. Click on View Report.

| Scenario       |   |              |  |
|----------------|---|--------------|--|
| 2018-2019[SY]  | • |              |  |
| Start Date     |   | End Date     |  |
| 19-June-2019   | = | 19-June-2019 |  |
| Run (Number) * |   |              |  |
| Required       |   |              |  |
| Arrival Status |   |              |  |
|                |   |              |  |

### Planned vs Actual Report Content

#### PLANNED VS ACTUAL AT SCHOOLS REPORT

These reports are designed to display Run, Route, Vendor, Bus and School information as well as:

- a. Planned Arrival Time at School based on the planned route.
- b. Actual Arrival Time at School based on GPS/AVL data.
- c. Delta values. These are the differences between Actual and Planned (A-P) or Actual and Limit (A-T) Arrival Times.

|               |             |                 |        |                   | Plan          | ned ve        | s Actual At S          | chool          | s                      |                                |                        |                              |                               |                |
|---------------|-------------|-----------------|--------|-------------------|---------------|---------------|------------------------|----------------|------------------------|--------------------------------|------------------------|------------------------------|-------------------------------|----------------|
| 03/13/17      |             |                 |        |                   |               |               |                        |                |                        | a                              |                        |                              | b                             | С              |
| Run<br>Number | Run<br>Type | Route<br>Number | Vendor | Vendor<br>Manager | Bus<br>Number | Bus<br>Status | School Name            | School<br>Type | School<br>Unit<br>Code | Planned<br>Arrival<br>Time (P) | School<br>Bell<br>Time | Limit<br>Arrival<br>Time (T) | Actual<br>Arrival<br>Time (A) | Delta<br>(A-T) |
| 0112.051      | BLANK       |                 |        |                   | IC1439        | Temporary     | Real Property lines of | Other          | 610497-<br>54266       | 07:45:00                       |                        |                              | (Skipped)                     |                |
| 0112.052      | BLANK       |                 |        |                   | AM858         | Temporary     | Real Party last 4      | Other          | 610497-<br>54266       | 07:45:00                       |                        |                              | (Skipped)                     |                |
| 0112.053      | BLANK       |                 |        |                   | IC1385        | Temporary     | Real Property lines of | Other          | 610497-<br>54266       | 07:45:00                       |                        |                              | (Skipped)                     |                |
| 0112.054      | BLANK       |                 |        |                   | D187          | Temporary     | Real Party last 4      | Other          | 610497-<br>54266       | 07:45:00                       |                        |                              | (Skipped)                     |                |
| 0112.151      | BLANK       |                 |        |                   | IC1439        | Temporary     | Real Property lines of | Other          | 610497-<br>54266       | 13:10:00                       |                        |                              | (Skipped)                     |                |

#### PLANNED VS ACTUAL AT STOPS REPORT

These reports are designed to display Run, Route, Vendor, Bus and Stop information as well as:

- a. Planned Arrival Time at Stops based on the planned route.
- b. Actual Arrival Time at Stops based on GPS/AVL data.
- c. Delta values. These are the differences between Actual and Planned Arrival Times (A-P).

|            |             |                 |        | Pla               | nned v        | vs Actu       | al At Stops                              |                |                  |                                |                               |                |
|------------|-------------|-----------------|--------|-------------------|---------------|---------------|--|----------------|------------------|--------------------------------|-------------------------------|----------------|
| 03/13/17   |             |                 |        |                   |               |               |  |                |                  | а                              | b                             | С              |
| Run Number | Run<br>Type | Route<br>Number | Vendor | Vendor<br>Manager | Bus<br>Number | Bus<br>Status | Stop Name                                | Stop<br>Number | Stop<br>Sequence | Planned<br>Arrival<br>Time (P) | Actual<br>Arrival<br>Time (A) | Delta<br>(A-P) |
| 0112.051   | BLANK       |                 |        |                   | IC1439        | Temporary     | 6011 S TALMAN AV, Chicago, IL<br>60629   | 532            | 1                | 07:05:00                       | (Skipped)                     |                |
| 0112.051   | BLANK       |                 |        |                   | IC1439        | Temporary     | 2115 W 63RD ST, Chicago, IL<br>60636     | 530            | 2                | 07:10:00                       | (Skipped)                     |                |
| 0112.051   | BLANK       |                 |        |                   | IC1439        | Temporary     | 7136 S SEELEY AV, Chicago, IL<br>60636   | 533            | 3                | 07:16:00                       | (Skipped)                     |                |
| 0112.051   | BLANK       |                 |        |                   | IC1439        | Temporary     | 7158 S WOLCOTT AV, Chicago, IL<br>60636  | 531            | 4                | 07:18:00                       | (Skipped)                     |                |
| 0112.051   | BLANK       |                 |        |                   | IC1439        | Temporary     | 7610 S SANGAMON ST, Chicago,<br>IL 60620 | 529            | 5                | 07:28:00                       | (Skipped)                     |                |

### **REPORT BUILDER**

The Report Builder tool, accessible within the Compass **Reports** module, allows users to generate customized Reports based on available types know as Master Reports.

When accessed, the Report Builder menu displays two different areas: The **Master Reports** section shows the Comprehensive Reports and the **District Reports** section holds those reports that have been created by the users and may be customized.

### Generating Reports with Report Builder

To create Reports through the Report Builder:

- 1. Click on the Report Builder tab on the left side of the screen.
- 2. Choose the Comprehensive Report type you want to create (Stop, Student, Run or Route Report) under Master Reports and click its corresponding View icon.

|     |                  | 😑 Report Bui | ilder                                  |      | Vancou                                       | ver, Vancouver | Logout 🕞 |
|-----|------------------|--------------|--|------|--|----------------|----------|
|     |                  |              |  |      |  |                |          |
|     | COMPASS          |              |  |      | ]  |                |          |
|     |                  |              | Report Builder                         |      | Search Search for a report                   |                |          |
|     | Reports          |              | Master Reports                         |      | District Reports                             |                |          |
| 0   | Report Builder   | 1            | Run Change Revision Report             | Ĵ Ĉ  | Comprehensive Route Cover Sheet (Black Stops | jî 🌶           | Î        |
|     | Routes           | >            | Comprehensive Route Cover Sheet Report | ĴĹ   |  |                |          |
|     | Runs             | >            | Comprehensive Stop Report              | Ĵ Ľ  |  |                |          |
| *** | Students         | >            | Run Information Report                 | Ĵ Ľ  |  |                |          |
| 1   | Schools          | >            | Summarized route distance              | Ĵ Ľ  |  |                |          |
| \$  | Actions          | >            | Planned vs Actual At Stops Report      | ,Ö 🖄 | View button                                  |                |          |
| Ø   | AVL/GPS Mobile   | >            | Comprehensive Student Report           | Ĵ Ľ  |  |                |          |
|     | Calendars        | >            | Planned vs Actual At Schools Report    | Ĵ Ĉ  |  |                |          |
| _   | District Reports | >            | Route Operation Report                 | j Č  |  |                |          |
|     | User Reports     | >            | Comprehensive Run Report               | ĴĽ   |  |                |          |
|     |                  |              | Comprehensive Route Report             | ¢ Č  |  |                |          |

3. Enter the information in the Required Fields. These fields show a Required tag highlighted in red underneath the text box and a star next to the name of the field. Data for these fields, such as Scenarios or Schools, is loaded from Compass Route Builder.

Some fields, including the required fields, work as pull-down menus that show all the available options. If necessary, you can also manually enter additional information in other fields.

- 4. If preferred, select any available Additional View Options before viewing your Reports:
  - You can paginate your Comprehensive Student Reports by clicking on the Paginated Display.
  - You can create Comprehensive Stop Reports with student information presented in additional rows by clicking on the Show Student Information button.
  - You can add Directions and show Student Information and a Map in your Comprehensive Run and Route Reports by clicking on their respective buttons.

| Scenario *            |                          | Report Date *  |      |
|-----------------------|--------------------------|--|------|
| 2017-2018[SY]         |                          | +  | =    |
|                       |                          | Required   |      |
| Route (Name / Number) |                          | Run (Number)   |      |
|                       |                          |  |      |
| Schools *             |                          |  |      |
|                       |                          |  |      |
| Required              |                          |  |      |
| Vehicles              |                          | Depots   |      |
| Venicies              |                          |  |      |
|                       |                          | Required   |      |
|                       |                          | (Colorison Colorison Color |      |
| Show Directions       | Show Student Information |  |      |
| $\bigcirc$            | $\bigcirc$               | Required Fi  | elds |
|                       |                          |  |      |
| Include Map           |                          | Additional View Option   | ons  |
|                       |                          |  | 0115 |

5. Click the **View Report** button located at the bottom to generate your Report.

| Schools *       |                          |          |
|-----------------|--------------------------|----------|
|                 |                          |          |
| Required        |                          |          |
| Vehicles        |                          | Depots   |
|                 |                          |          |
|                 |                          | Required |
| Show Directions | Show Student Information |          |
| Include Map     |                          |          |
| View Report     | View Report              |          |

To review how the Reports are organized and how they display the information, visit the Understanding Reports tutorials:

- Understanding Comprehensive Student Reports
- Understanding Comprehensive Run Reports
- Understanding Comprehensive Route Reports
- Understanding Comprehensive Stops Reports

### **Creating Custom Reports**

If necessary, the new Report Builder allows users to customize and then save their Reports by accessing the **Reports Online Designer** tool. To create a Custom Report:

- 1. Click the customize icon next to the Report type you want to customize within the Master Reports area.
- 2. Enter a name for your report in the text box within the **District Reports** area.
- 3. Click the **Save** icon next to the name text box.

| Report Builder                         |     | Search Search for a report            |            |
|--|-----|---------------------------------------|------------|
| Master Reports                         | 1   | District Reports                      | 3          |
| Run Change Revision Report             | I Č | Enter the report name                 |            |
| Comprehensive Route Cover Sheet Report | ĴĹ  | Report name is required               |            |
| Comprehensive Stop Report              | Ĵ Ľ | District Fields Student Report (Jess) | Ĵ 🖍 🔋      |
| Run Information Report                 | Ĵ Ľ | 1. Click on the customize button      | Ø / 1      |
| Planned vs Actual At Stops Report      | Í Í | 2. Enter a name for the report        |            |
| Comprehensive Student Report           | ් ් | 3. Click on the save symbol           | තී 🧪 📋     |
| Planned vs Actual At Schools Report    | Ĵ Ľ | Mirhtest                              | j / 🗎      |
| Route Operation Report                 | Ĵ Ĺ | Release test Cover Sheet Report       | <u>گ</u> ا |
| Comprehensive Run Report               | Í Ľ |                                       |            |
| Comprehensive Route Report             | I Č | Route 002                             | ð / ī      |
|  |     | Route 003                             | j / 📋      |

4. After clicking the Save button the Reports Online Designer displays a template that can be edited by the user.

| me Report Layout Vie | w Components Bands               |   |                            | SEON Reports Online Des  |
|----------------------|----------------------------------|---|----------------------------|--|
| Cut 🚽                |                                  |   | PageRuns 21.00 29.70 Extra |  |
|                      | 1 2                              | 3 4 5 6 7 8                                     | 9 10 11 1                  | 2 * 13 * 14 * 15 * 16 * 17 * 18 *  |
|                      |                                  | Route Report                                    |                            | Academy  |
|                      | 1                                |   | Report Date:               |  |
|                      | <sup>2</sup> ROUTE               | [STUDENTS.STOPS.RUNS.ROUTE                      | ES.TIER_F Garage/Depot     | [STUDENTS.STOPS.RUNS.ROUTES.DEPC   |
| GroupHeader1: [STUD  | Effective Date                   | [FormatDateTime([STUDENTS.STC<br>hh:mm:ss tt")] | PS.RUNS Vehicle            | [STUDENTS.STOPS.RUNS.ROUTES.VEHI   |
|                      | [STUDENTS.STOP                   | S.RUN   |                            |  |
|                      | <sup>4</sup> SubreportRunsSchool | s   |                            |  |
| Child3               | SubreportMapRoute                |   |                            |  |
|                      | RUN                              | [STUDENTS.STOPS.RUNS.ROUTE_N                    | AME_1]                     |  |
|                      | 1 Vehicle                        | [STUDENTS.STOPS.RUNS.VEHICLE_                   | NUMBER] Route Name         | [STUDENTS.STOPS.RUNS.TIER_ROUTE_NAM  |
|                      | List of Schools                  | [STUDENTS.STOPS.RUNS.SCHOOLS                    | _CODE] Garage/Depot        | [STUDENTS.STOPS.RUNS.DEPOT_NAME]   |
| 1                    | 2 Run Revision                   | [STUDENTS.STOPS.RUNS.REVISION                   |                            | properties are a store strong that to be an a store and a store an |
|                      | . First/Last Dur U               | [STUDENTS.STUPS.KUNS.FIKST_TU                   |                            | miles  |
| i i                  | Total Durat U                    | minutes   | Total Pupils               | [STUDENTS.STOPS.RUNS.TOTAL_PASSENG   |
| GroupHeader3: [ST    | Total Stops                      | [STUDENTS.STOPS.RUNS.NUMBER                     |                            |  |

## Editing Custom Reports

Your Reports can be customized through the Fast Report Online Designer tool. This tool gives you the chance to edit the visual aspects of your Report as well as the text content of its fields.

#### **Editing Layout and Structure**

The Online Designer shows six different toolbars which contain many elements that will help you customize the design of your Report.

• The **Home** toolbar allows you to add or remove columns and rows, edit fonts, alignment, borders and fill colour of cells. To do so, click on the section you want to edit and enter the preferred parameters in the toolbar.

| ome Report Layo            |                   | ;  |                  | SEON Reports Online Desig   |
|----------------------------|-------------------|--|------------------|---|
| Copy                       | Arial •           | 🗛 🞹 🗰 🗈 🔝 🗄 🖷 📾 👒 💽 Cell11                   |                  |   |
| Paste N Delete             | e B I ∐ abx 8 ▼   | 🗉 🗏 🗏 👌 🥒 Solid 🔻 1 💌 🐐 List of              | Schools          |   |
| Clipboard                  | Font              | Alignment Border and Fill                    | Extra            |   |
|                            | · 1 · 2           |  | 9 ' 10 ' 11 '    |   |
|                            | •                 | Abington Compr                               | ehensive l       | Run Report  |
| 6                          | 1                 | Re   | eport Date:      |   |
| [dīn9]                     | 2 RUN             | [STUDENTS.STOPS.RUNS.ROUTE_NAME_1]           |                  |   |
| Ë                          | . Vehicle         | [STUDENTS.STOPS.RUNS.VEHICLE_NUMBER]         | Depot            | [STUDENTS.STOPS.RUNS.DEPOT_NAME]                                  |
| GroupHeader1: [STOPS.ROUTE | List of Schools   |  | Effective Date   | [FormatDateTime([STUDENTS.STOPS.RUNS.EFFECTIVE_DAT<br>hh:mm tt")] |
| r1: [S                     | Run Revision      | [STUDENTS.STOPS.RUNS.REVISION]               | End Date         | [FormatDateTime([STUDENTS.STOPS.RUNS.END_DATE],"MM<br>hh:mm tt")] |
| leade                      | 5 Distance        | [STUDENTS.STOPS.RUNS.ROUTE_TOTAL_DISTANCE]   | Duration         | [STUDENTS.STOPS.RUNS.ROUTE_TOTAL_TIME]                            |
| roupt                      | First/Last Dist   | [STUDENTS.STOPS.RUNS.FIRST_TO_LAST_STOP_DIST | First-Last Durat | [STUDENTS.STOPS.RUNS.FIRST_TO_LAST_STOP_DURATIO                   |
| 6                          | Total Stops       |  | Total Students   |   |
|                            | 7 [STUDENTS.ST    | DPS.RUNS.ROUTE_NOTES]                        |                  |   |
| Child3                     | SubreportMap      |  |                  |   |
|                            | • STUDENT S. STOP |  |                  | Stop Id [STUDENTS.STOPS.ORDER NUMBER                              |

The **Layout** toolbar allows you to group or ungroup elements while the View toolbar provides the option to edit grids and guides in your document.

| Design Route Report Leadership Academy | Design Route Report Leadership Academy |
|--|--|
| Layout                                 | View                                   |

•

#### **Compass User Guide**

The **Components** toolbar holds several objects such as pictures, shapes, lines, tables, check boxes, etc., that you can add to your report.

When you click on them, these objects appear on the upper-left corner of the visible area of the document but you can later drag them to the preferred position. If you right-click on the object, a window showing optional features is displayed.

You can also drag and drop objects from the tool bar onto the position you want.

Components placed in the template can be edited by clicking on them and selecting the preferred parameters on the Home tab.

| I | Des              | sign Ro        | oute   | e Rep                | port             | _            |                          |                             | -             |           |                      |                        |                           |    |   |    |
|---|------------------|----------------|--------|----------------------|------------------|--------------|--------------------------|-----------------------------|---------------|-----------|----------------------|------------------------|---------------------------|----|---|----|
|   | 🖶 Hom            | ne Report      | Layou  | : View               | Compone          | ents B       | nds                      |                             |               |           |                      |                        |                           |    |   |    |
|   | A<br>Text<br>::: | Picture<br>::: | Shapes | Line<br>:::          | Subreport<br>::: | Table<br>::: | Matrix<br>:::<br>Compone |                             | ▲<br>h Text O | heckBax ( | Cellular Text<br>::: | Linear Gauge           | Simple Gauge              |    |   |    |
|   | ш<br>14          |                | -      |                      | 2 - 3            | - 4 -        | 5 - 6                    | 6 - 7 -                     | Ro            | oute F    | Report               |                        | 14 · 15 · 16<br>ort Date: | Ac | а на конструкции на к<br>Cademy | 25 |
|   | ī                | GroupHeader1:  |        | ROUTE<br>Effective D |                  | UNS.ROUTE    | (Forma                   | DENTS.STOP<br>atDateTime([S |               |           | -                    | [_NAME]<br>TES.ROUTE_D | Garage/Depot              |    | [STUDENTS.STOPS.RUNS.ROUTES.DEPOT_NAME]<br>[STUDENTS.STOPS.RUNS.ROUTES.VEHICLE_NUMB                                       |    |
|   |                  |                |        | SubreportRune        | sSchools         |              |                          |                             |               |           |                      |                        |                           |    |   |    |

The Bands toolbar allows you to add structural sections, or Bands, such as Title, Summary, Header, Footer, etc., to your Report.

This toolbar is especially useful when you want to start your own Report from scratch since it automatically arranges the selected items following a hierarchical organization. This means you don't have to worry about deciding the location of your sections.

To add Bands to your Report:

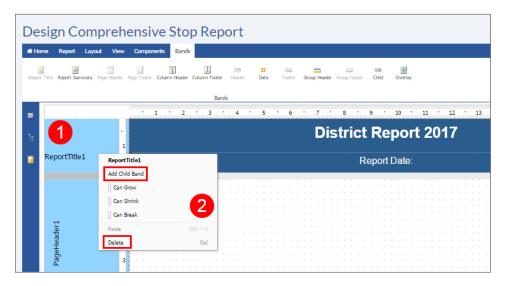
- 1. Click on **Bands**.
- 2. Click on the preferred type of Band you want to add. You will notice how these Bands appear in the appropriate location.

| De       | sign Compre                    | ehe       | nsi       | ve S   | Sto    | p R      | epo   | ort   |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|----------|--------------------------------|-----------|-----------|--------|--------|----------|-------|-------|-----|-------------|--------|-------|--------------|---------|-------|---------------|-----|-----------|-----|----|----|----|
| 🚮 Ho     | ome Report Layout V            | View      | Comp      | nents  | Bands  |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
| Repor    | t Title Report Summary Page He | sader Pag | je Footer | Column | Header | Column f | ooter | Heade | r ( | ## <br>Data | Footer | Group | nn<br>Header | Group f | ooter | iiii<br>Child | Ove | i<br>slay |     |    |    |    |
|          | <u> </u>                       |           |           |        |        |          | Bands | 5     |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          |                                |           | •         | 1 '    | 2      | · 3      | •     | 4     | •   | 5           | • 6    |       | 7 ·          | 8       |       | 9 ·           | 10  | •         | 11  | •  | 12 | 13 |
| <u>.</u> | *                              | 1         |           |        |        |          |       |       |     |             |        |       | Di           | stri    | ct    | Re            | epo | ort       | : 2 | 01 | 7  |    |
|          | ReportTitle1                   |           |           |        |        |          |       |       |     |             |        |       |              |         | R     | epor          | Da  | te:       |     |    |    |    |
|          |                                |           |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          |                                | •         |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          |                                |           |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          |                                | 1         |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          |                                | • }       |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          | fer                            | 2         |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          | eac                            | -         |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          | Ť                              | 1         |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |
|          | PageHeader1                    | 3         |           |        |        |          |       |       |     |             |        |       |              |         |       |               |     |           |     |    |    |    |

Report Builder

You can also add Child Bands (dependent Bands located underneath other existing Bands) or delete existing Bands following identical steps. To add a Child Band or to delete an existing Band:

- 1. Right-click on the selected Band.
- 2. Click Add Child Band or Delete within the pop-up window as needed.



### **Editing Content**

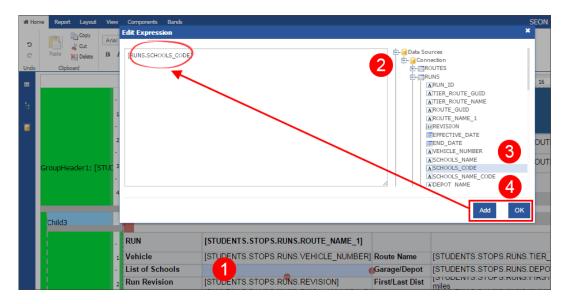
In addition to its structure and the way your report looks, the Online Designer also allows you to edit the content of the **Fields** as you need. To edit the content of a Field:

- 1. Double-click on the Field.
- 2. After the Edit Expression window appears, type the new text.

| Design Route       | Report                                 | adeny  |                 |
|--------------------|--|--|-----------------|
| Home Report Layout | View Components Bands                  |  | SEON            |
| D tropy            | Arial Edit Expression                  | ble-click the selected d and type new text           | ×               |
| GroupHeader1: [ST  | ис эл Е<br>  [1<br>  4<br>  Su<br>  Su | h  | Add OK          |
|                    | . RUN                                  | [STUDENTS.STOPS.RUNS.ROUTE_NAME_1]                   |                 |
|                    | 1 Vehicle                              | [STUDENTS.STOPS.RUNS.VEHICLE_NUMBER]                 | Route Name      |
|                    | List of Schools                        | (STUDENTS.STOPS.RUNS.SCHOOLS_CODE)                   | Garage/Depot    |
| 1                  | 2 Run Revision                         | [STUDENTS.STOPS.RUNS.REVISION]                       | First/Last Dist |
|                    | . First/Last Dur U                     | TOTOPENTS.STOPS.KUNS.TIKST_TO_EAST_STOP_DORATION_OSE | Total Distance  |

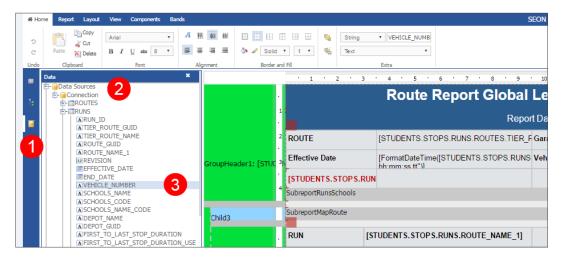
**Data Cells** need information loaded from the **Data Sources**. These are located on the left side of the online designer within the data tree, but they also appear by double-clicking on the Data cells. To input Data:

- 1. Double-click on the selected Data Cell. The Edit Expression window will appear.
- 2. Pull-down the Data Sources tree within the window by clicking on the + symbol next to it.
- 3. Find the appropriate Data Source and click on it.
- 4. Click Add and then OK. The Data Source will show in the selected cell.



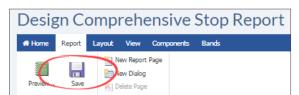
If the Data cell is already filled, you can still edit its content. The process is almost identical but you will need to delete the old source before adding a new one (between steps 2 and 3). You can also drag and drop a Data Source into a Data cell. To do so:

- 1. Click on the **Data** tree icon located on the left side of the online designer.
- 2. Pull-down the **Data Sources** tree by clicking on the + symbol next to it.
- 3. Find the appropriate Data Source and drag and drop it into the selected Data cell.



### **Previewing and Saving Your Report**

You can always preview the report after editing any of its features by clicking on the Preview button on the Report tab. Once you have finished editing your report click the **Save** button on the same Report tab.



# COMPASS ADMIN MODULE

- 1. COMPASS ADMIN MODULE p.96
- 2. USER ADMIN p.96
  - Managing Users in Admin Module p.96
  - Managing User Roles in Admin Module p.101
  - Managing Reports in Admin Module p.103
- 3. AUTOMATIC VEHICLE LOCATION p.108
  - Configuring AVL in Compass p.108
  - Tracking Vehicles in Real Time p.110
  - Viewing AVL History p.111
  - Applying History Filters p.112

### **COMPASS ADMIN MODULE**

The following tutorials illustrate how to use the Compass Admin Module to perform several administrative tasks. The sections included here explain concepts such as Users, Roles, Profiles or AVL accounts, and exemplify relevant related workflows. To access the Admin Module, log in to Compass Route Builder and click on the Admin tab. The Admin Module will be displayed.

| COMPASS Route Builder   | Current Scenario ESY2017   |
|---|--|
| 🕼 Schools 🚧 Barriers 🎓 Depots 🐵 Stops 💭 VIM 🔫 Tiering 🛢 Data 🗸 📋 Repor  | ts 🗸 🛔 SSD Portal 🔯 Admin 💿 🥹 🗸 🖙 Logout   |
| Routes Runs Stops Vehicles Workspace Result Students Action Requests  |  |
| Schools         Grades         Pickup:           245         01         Dropoff:           110x         02         Stop Id: | Pionoradon St Willage 57   |
| Student ID/Name: All T  | Alternov Rd  |
| Only With Students Assigned Only Without Students Assigned     Find trip order/stops with no bus assignment                 | and the state of t |
| Use Geofence Ungeocoded Wheelchair Aide ESY Create new result   | Long Ka  |
| Gen Ed Sp Ed Magnet   | St P P B B B B B B B B B B B B B B B B B   |
| Admin Billable Med Need Incl. No Auto Assign Exclude Zero Assigned Rider Count Mirrored Not Mirrored                        | to the the the test of tes |
|   | Sources: Esri, HERE, Garmin, USGS Interm   |

### **USER ADMIN**

# Managing Users in Admin Module

The Admin Module allows customers to create and edit Compass Users, as well as to give Users permission to access different sets of features by assigning them User Roles. Customers can also edit existing Roles.

Similarly, the Report Profiles menu can be used to grant Users access to certain types of Reports within the Admin Module, and customers can easily edit previously created Report Profiles too.

To access the Admin Module, log in to vMax Compass Route Builder and click on the Admin tab. The Admin Module will be displayed.

### **Creating a New User**

When you click on the **Users** tab, a table with existing users is displayed. This table shows a list of User Names and their corresponding Full Names and Status (Active or Non-Active). Users can be set as Active or Non-Active but they can't be deleted from the system once they have been created.

Existing Users can be edited but you can also create New users.

To create a New User:

- 1. Click on the **Users** tab.
- 2. Click on the **New** button (see following figure).

#### **Compass User Guide**

|                      | <b>→</b> ← |                 |                  | E Log Out E |
|----------------------|------------|-----------------|------------------|-------------|
| COMPASS              | Users      |                 | User Name Full   | Name Q New  |
| Administration       |            | User Name       | Full Name        | Active      |
| Administration       | / =        | abgormley       | Holdsworth Arry  | Yes         |
| Inspection Templates | / =        | aboone          | Born Advisor     | Yes         |
| Inspection History   | / =        | aboyle          | Brain Agent      | No          |
| ້ 🚹                  | / =        | aboyle8080      | Bryte Agena      | Yes         |
| Users                | / =        | aboyle-ext      | Brain Agent      | No          |
| Users                |            | abridgeford-ext | Brogetter, Andre | No          |

The Account Information section is displayed first by default. Once there:

- 1. Input Personal Data such as Username, Employee ID, First and Last Name and Email in the corresponding text boxes.
- 2. Create a **Password**. Notice that Passwords must have, at least, one non letter or digit character and, at least, one digit ('0'-'9') and, at least, one uppercase ('A'-'Z'). Once created, proceed to confirm right below.
- 3. Select the Authentication Mode for the New User.

These Modes can be different depending on the customer. For Compass Cloud customers, you'll need to choose COMPASS from the drop-down menu.

| Account Info        | ormation 🏦 Scenarios 🔧 Features 🗸 Access 🗸   |                         |  |
|---------------------|--|-------------------------|--|
| Jsername            |  | Authentication<br>Mode  | COMPASS -3   |
| mployee ID          | -1   | User Role               | Admin     APS SCN School User     Assistant Superintendent                                       |
| irst Name           |  |                         | Assistant Superintendent     Charter User  |
| ast Name            |  | Report Profiles         | APS SCN School User  |
| mail                |  |                         | <ul> <li>Assistant Superintendent</li> <li>Charter User</li> <li>Contract Garage User</li> </ul> |
| assword             | Passwords must have at least one non letter or digit character.  | Compass<br>Startup Page | •  |
|                     | Passwords must have at least one digit ('0'-'9'). Passwords must<br>have at least one uppercase ('A'-'Z'). | Driver Status           |  |
| Confirm<br>Password |  | Driver Name             | BLANK  |
| assworu             |  | Vendor                  |  |
| Active              | ∞7   | Please select scent     | narios first so you can choose vendors   |

- 4. Select the User Role and the Report Profiles assigned to the New User.
- 5. Select the preferred Compass Start-Up Page.
- 6. If the user is to have **Driver Status** check the corresponding box. Otherwise, assign a driver from the **Driver Name** drop-down menu.

(list continued)

- 7. Check the **Active** box close to the bottom of the screen.
- 8. Click Save and then Next to move on to Scenarios.

### NOTE:

Users with Driver Status can only access Compass through a Mobile Data Terminal (MDT) such as vMax Navigator.

Once the Account Information has been completed:

1. Scroll down the **Scenarios** list and select the preferred Scenarios to be assigned to the User by checking the corresponding boxes. Notice that an Admin user can assign any combination of scenarios to a User Profile.

Click **Next** at the bottom of the screen and move on to Features.

2. Scroll down the **Features** list and select the preferred Features to be enabled for the User by checking the corresponding boxes.

Click **Next** at the bottom of the screen and move on to Access.

3. In the Access section click the Access tab to display a list of available Schools within three different categories (Schools Access, TAR Schools and Analyst Responsible Schools) and a list of Depots.

By default, all available Schools in each category and all Depots are selected. If necessary, deselect this option to view the complete lists and select Schools and Depots as required.

4. Click Save.

| Account Information | Scenarios           | Features          | 🗸 Access 🗸                |
|---------------------|---------------------|-------------------|---------------------------|
| All Schools Allowed |                     |                   | Schools Access            |
|                     | Scho                | ol Access         | TAR Schools               |
| Select All          |                     |                   | Analyst Responsible Schoo |
| 0596 - A STEP UP A  | CADEMY 2 (2018-20)  | [9[SY])           | Depots                    |
| 3901 - ABINGTON FR  | RIENDS (2018-2019[5 | SY])              |                           |
| 5920 - ABINGTON J   | JNIOR HIGH SCHOO    | L (2018-2019[SY]) |                           |
| 2620 - ACADEMY AT   | PALUMBO (2018-20    | )19[SY])          |                           |
| 3990 - ACADEMY OF   | F NOTRE DAME DE N   | IAMUR (2018-2019) | SY])                      |
| 4921 - ACADEMY OF   | THE NEW CHURCH      | (2018-2019[SY])   |                           |
| 3498 - AD PRIMA CH  | ARTER ANNEX (2018   | 8-2019[SY])       |                           |
| 3379 - AD PRIMA CH  | IARTER SCHOOL (20   | 18-2019[SY])      |                           |
| 5200 - ADAIRE. ALE  | XANDER SCHOOL (2)   | 018-2019[SY])     |                           |
| 6902 - ADELAIDE ED  | DUCATIONAL CENTE    | R (2018-2019[SY]) |                           |
| 3903 - AGNES IRWIN  | N SCHOOL (2018-201  | 19[SY])           |                           |
| 4925 - AIM ACADEM   | Y (2018-2019[SY])   |                   | •                         |
|                     |                     |                   |                           |

#### **Editing Existing Users**

Within the Users menu, customers can find existing users and edit their information and those permissions assigned to them, such as User Roles, Report Profiles, etc. To edit an Existing User:

- 1. Enter User Name in the text box. A list with matching Users appears.
- 2. Select the right User and click on the magnifier. You will see a table displaying the User Name, Full Name and activity status (Active or Non-Active).
- 3. To edit the information, click on the **Edit** button.

|                      | <b>→</b> ← |             |                     | Log Out ج |
|----------------------|------------|-------------|---------------------|-----------|
| COMPASS              | Users      |             | User Name Full Name | Q New     |
| Administration       | <b>-3</b>  | User Name   | Full Name           | Active    |
| Administration       |            | acszymanski | Stramaniki Arra     | No        |
| Inspection Templates | Z =        | acunningham | Contriguen Auditory | Yes       |
| Inspection History   | /=         | acutts      | Cutto, Annual       | No        |
| •                    | / 1        | acwallace   | Audio Walana        | No        |
| Users                | / 1        | adaly-ext   | Calg Array          | Yes       |
|                      | / 1        | adavis2310  | Davis April         | Yes       |

- 4. If necessary, enter new Personal Data such as Username, Employee ID, First and Last Name and Email in the corresponding fields.
- 5. Edit the **Authentication Mode** for the User if required. Remember that these Modes always depend on the customer type. For Compass Cloud customers, you'll need to select **COMPASS** from the drop-down menu.
- 6. Set User as **Active** or **Non-Active** by checking the corresponding box. Remember they can't be deleted once they have been created.

| Username               | acszymanski | User Role               | C Admin                               | <b>^</b>   |
|------------------------|-------------|-------------------------|---------------------------------------|------------|
| Employee ID            | 0000051656  |                         | APS SCN School User                   |            |
| Linployee ib           |             |                         | Assistant Superintendent              |            |
|                        |             | •                       | Charter User                          | • -7       |
| First Name             | Amy         | Report Profiles         | APS SCN School User                   | A          |
| ast Name               | Comments    |                         | Assistant Superintendent              |            |
| Last Name              | Szymanski   |                         | Charter User                          |            |
| Email                  |             |                         | Contract Garage User                  | -          |
|                        |             | Compass<br>Startup Page | SSD Portal                            | · <u> </u> |
| Authentication<br>Mode | LDAPS •     | Driver Status           |                                       | 7-9        |
| Active                 | □ -6        | Driver Name             | BLANK                                 | · _        |
|                        |             | Vendor                  |                                       |            |
|                        |             | Please select scen      | arios first so you can choose vendors |            |
|                        |             | Vendor(s)               |                                       | ÷          |

- 7. Select or deselect **User Roles** and **Report Profiles** assigned to the User.
- 8. Select the preferred Compass **Start-Up Page**.
- 9. If the user is to have **Driver Status** check the corresponding box. Otherwise, assign a driver from the **Driver Name** drop-down menu.
- 10. Click **Save** and then **Next**.

Once the Account Information has been edited, proceed to the other menus and complete the process as necessary.

The steps are very similar to those already explained in the previous Creating a New User section.

By clicking Next in the Account Information dialog, the Scenarios menu will be disclosed.

- In the Scenarios dialog, Scroll down the list, check those Scenarios that need to be updated and enter the new information. Click Next to move on to Features.
- Scroll down the Features list. If needed, update the Features that have to be enabled for the user.

Click **Next** to move on to Password.

 Change the Password if required. Remember that Passwords must have, at least, one non letter or digit character and, at least, one digit ('0'-'9') and, at least, one uppercase ('A'-'Z').

Click **Next** and move on to Access.

 The Access drop-down menu shows different School categories and a Depot list.

| User 1 2                                     | 3 4                 |
|--|---------------------|
| Account Information 🏦 Scenarios 🔦 Features 🔒 | Password 📿 Access 💟 |
|  | Schools Access      |
| Select All Analyst Responsible Schools       | D TAR Schools       |
|  |                     |
|  | Depots              |
|  |                     |
|  |                     |
|  |                     |
|  |                     |
|  |                     |
|  |                     |
|  |                     |
| C 200 - 200 withoware feeling                |                     |
| C 210-220 resided servering                  |                     |
| ■ 220_220 (/appoul/or2017_2019) ▼            | 1                   |

School categories are: **School Access, TAR Schools** and **Analyst Responsible Schools**. Edit the preferred School and Depot selections as required. To view the complete lists of Schools and Depots make sure the option "All Allowed" is unckeched.

5. Click Save.

### Managing User Roles in Admin Module

The Admin Module allows customers to give users permission to access different sets of features by assigning them **User Roles**. Customers can also edit existing Roles.

If you have read the previous tutorial, *Creating and Editing Users in Admin Module*, you already know that, in order to access the Admin Module, you need to log in to Compass first and then click on the Admin button.

### **Creating New User Roles**

The Admin Module shows the **Roles** menu on the left of the screen. The Roles menu is a tool to create, edit or delete those Roles that can be assigned to users. Existing User Roles become visible once you access this menu.

To create a New Role:

- 1. Click on the Roles tab on the left of your screen. The new menu appears.
- 2. Click the New button. A new window showing the features that can be included in a Role is displayed below.

|                      | →← Svancouver Log 0    |
|----------------------|------------------------|
| Administration       | Roles 2<br>New Delete  |
| Inspection Templates |                        |
| Inspection History   | C Building Users       |
| 👤 Users 🚹            | C Drivers              |
|                      | € SIS                  |
| Roles                | C Sped office          |
| Reports              | 🖒 Transportation Staff |

- 3. Enter a new Role Name in the corresponding text box.
- 4. Add those features to which the user will have access by clicking on them. The selected features will move to the right column. You can always deselect permissions by clicking the features back to the left column.
- 5. Click on the **Save** button.

| Enter new role name                              | ave | 5 |      |             |
|--|-----|---|------|-------------|
| filter   | Ð   | 0 | Э    |             |
| Access to Vendor Information Management<br>(VIM) | +   | A | dd A | New Barrier |
| Add A New Depot                                  | +   | A | dd A | New School  |
| Add a new vehicle                                | +   | Ļ |      |             |
| Add a Student                                    | +   | 4 |      |             |
| Add Aide (VIM)                                   | +   |   |      |             |
| Add Driver (VIM)                                 | +   |   |      |             |
| Add New Student through Route Builder            | +   |   |      |             |

#### User Admin

#### **Editing Existing User Roles**

Existing User Roles are easily edited in the Roles menu. Features to which users have access can be added or removed with a simple click.

To Edit an Existing Role:

- 1. Click on the Roles tab on the left of your screen. The new menu appears.
- 2. Find the **Role** you want to edit in the list and click on it to select it. A new window showing the permitted (right column) and non-permitted (left column) features is displayed below.
- 3. Add features to the Role by clicking on them in the left column. The selected features will move to the right column.

Remove features by clicking on them in the right column. The selected features will move to the left column being removed from the Role's permissions.

4. Click on the Save button.

| COMPASS              | Roles<br>New Delete  |
|----------------------|--|
|                      | C Admin  |
| Administration       | 🖸 assign   |
|                      | 🗹 Assistant Superintendent   |
| Inspection Templates | C Building Users   |
| Inspection History   | C Drivers  |
|                      | <b>I</b> SIS   |
| Lusers               | C Sped office  |
|                      | 🕑 Transportation Staff   |
| Roles                | 🖸 Vendor User  |
| Reports              | 🕑 VIM Admin User   |
| Scenarios            | © VIM User 2   |
|                      | VIM User Save 4  |
| Global Settings      | filter 🕘 Θ   |
| Login History        | Access to Vendor Information Management (VIM) - Add Vendor (VIM) - |
|                      | Add A New Barrier  |
|                      | Add A New Depot  |
| 3-                   | Add A New School   |
|                      | Add a new vehicle  |
|                      | Add a Student + Edit Vendor (VIM) -                                |
|                      | Add Aide (VIM) +   |

### Managing Reports in Admin Module

Similarly to how it is explained for Roles, the Reports Profiles menu can be used to grant Users access to certain types of Reports within the Admin Module, and customers can easily edit previously created Report Profiles too.

In order to access the Admin Module, you need to log in to Compass first and then click the **Admin** button.

Within Reports, you'll find a Menu and a Profiles dialog under their corresponding tabs:

Menu displays every Report available in Compass. Reports are grouped by category and users can disclose or hide each Report by clicking on the Expand/Collapse buttons (v/>) located beside the category name. Alternatively, users can disclose or hide all Reports by clicking on the Expand All/Collapse All button near the top for a friendlier display.

Add, Edit and Delete buttons are available to the right of each Report category. Additionally, Edit and Delete buttons are also located to the right of each existing Report.

|                      | <del>ب</del>                                      | S vancouver Log Out 🕤        |
|----------------------|---|------------------------------|
| COMPASS              | Reports   |                              |
| Administration       | Menu Profiles                                     |                              |
| Inspection Templates | New > Collapse All                                | View as specific profiles    |
| Inspection History   | A Report Builder                                  | Ø                            |
| •                    | Routes  | + 0 ×                        |
| Lusers               | > DRuns   | + C ×                        |
| Roles                | Students  | + 🛛 🗙                        |
| Reports              | Schools   | Add, Edit and Delete buttons |
| Scenarios            | Trans. Statistics Expand report categories to see | C ×                          |
| Global Settings      | School Stops existing report types                | Ø ×                          |
| Login History        | Actions   | + C ×                        |
| Ŭ                    | Analyst Daily Action                              | Ø <b>×</b>                   |
|                      | Routing Actions                                   | C X                          |
|                      | Possible Duplicate Students                       | <b>2</b>                     |
|                      | • Ø AVL/GPS Mobile                                | + 0 ×                        |

Notice that a **View As** drop-down menu, located on the upper-right corner of the list, allows the selection of Profiles to directly display their corresponding view mode, i.e., disclosing the Report categories and Report types of interest only.

To the right of Menu, the **Profiles** tab discloses a list of the available Profiles, allowing users to edit them, create new ones and assign the Report types each Profile will have access to.

#### **Creating New Reports**

There are two ways to create new Reports by means of the Administration Reports tool: With the +New button located above the Reports list and with the Add button available to the right of each existing Report category. Let's see the details of these workflows.

To create a New Report, once you have accessed the Reports tool:

- Click on the New button on the left side of your screen. A new Menu Item window appears. 1.
- Enter the text you would like to be displayed in the **Display Text** box. 2.
- Select the **Report Type** that you need from the drop-down menu. 3.
- Insert the URL where the Report will be hosted. 4.
- Select the Icon you want to assign to the Report from the available icons drop-down menu. 5.
- Select the Profiles for which you want this New Report to be Active by checking off the boxes next to them. 6.
- 7. Click on the **OK** button.

|                      | <b>→</b> +                 |   |           |
|----------------------|----------------------------|---|-----------|
| COMPASS              | Reports                    | Menu Item                                   |           |
| Administration       | Menu Profile               | Display Text.                               |           |
| Inspection Templates | New                        | Report Type:<br>Select a option             |           |
| Inspection History   | Report Buil                | Navigate Urt                                | _         |
| Lusers               | Route Char                 |   | _         |
| Roles                | Routes w/                  | Profile Active<br>Admin<br>Buildings        |           |
| Reports              | Tiered Rou                 | Garage General G<br>Power User G            |           |
| Scenarios            | Tiered Rou                 | Router<br>Test ADMIN<br>Vendor User Reports |           |
| Global Settings      | Tiered Rou                 |   | Cancel Ok |
| O Login History      | Tiered Rou<br>Route Direct | tions (PDF)                                 |           |

Remember that you can always create a New Report within a specific Report category by clicking the Add button to the right of this (see figure in previous section). Once the **Menu Item** dialog is displayed, the rest of the steps are identical to the ones described above.

#### **Creating New Report Profiles**

Within the Profiles section, also included in the Reports tool, the user can create New Report Profiles, as well as view, edit the configuration or delete existing Profiles.

To create a New Report Profile:

- 1. Click **Reports** on the left of the screen to access the Reports Tool.
- 2. Click **Profiles** to access the Profiles section.
- Expand the Action menu. by clicking on it. New and Edit buttons are displayed.
- Click New. A new window displays.
- 5. Enter a **Profile Name** and click on the **Save** button. The new Reports Profile has been created and now you will have to set the features you want to assign to it.
  - To learn how, read the next section *Editing Report Profiles*.

|                      | <i>\$</i>                                 |                          |
|----------------------|---|--------------------------|
| COMPASS              | Reports<br>Menu Profiles 2                | Reports<br>Menu Profiles |
| Administration       | Profile: Admin                            | Profile: Admin           |
| Inspection Templates | Action - 3                                | Action -                 |
| Inspection History   | Select All                                | + New 4                  |
| Users                | Save                                      | Save                     |
| Roles                | Menu: ♥ Ø Report<br>Builder<br>▼ Ø Routes | Reports                  |
| Reports              | > ፼ Runs<br>> ፼ Students                  | Menu Profiles            |
| Scenarios            | ✓ I Schools<br>I Trans.<br>Statistics     | Profile:                 |
| Global Settings      | Ø<br>School<br>Stops<br>✔ Ø Actions       | Cancel Save 5            |
| Login History        | Actions<br>Analyst                        |                          |

### **Editing Report Profiles**

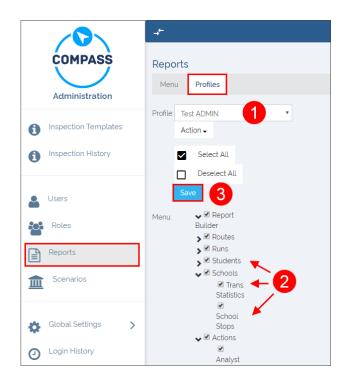
Once you have created a Report Profile, you need to edit its configuration by selecting those features you want to assign to the Profile.

To edit a Report Profile:

- 1. Select the Report Profile in the Profile drop-down menu.
- Select the Report types to be assigned by checking the corresponding boxes. You can select or deselect types as desired.

Notice that types are grouped into several categories which can be expanded or collapsed by clicking on the v/> buttons next to them. For example: When you click on the > button, on the left of **Schools, Trans Statistics** and **School Stops** are displayed. You can select both at the same time by checking off the **Schools box**, or you can choose one or the other by clicking them separately.

3. When you finish, click Save.



#### **Checking New Report Profiles in Menu**

After you have created and saved a new Report Profile in the Profiles section, you can always review the Report Profile and the enabled features in **Menu**.

To do so:

- 1. Within the Reports menu, click on the **Menu** tab.
- 2. Select the **User Profile** that you have created from the drop-down menu on the right. You should see the same features that you enabled for you Profile in the Reports Profile section (checked off boxes).

As an example, the figures below show both sections. Report Builder, four features in the Students category and two in the Schools category were selected when a Profile named The User Profile (left) was created, and the same features are now displayed under the Menu tab (right).

| Reports                    | Reports                           |
|----------------------------|-----------------------------------|
| Menu Profiles              |                                   |
|                            |                                   |
| Profile: The User Profile  | Collapse All     The User Profile |
| Action -                   |                                   |
| -                          | 🔅 Report Builder                  |
| Select All                 |                                   |
| Deselect All               | Students                          |
| Save                       | Student Search                    |
| Menu: 🗸 🖉 Report Builder   |                                   |
| ✓ Students                 | All Students                      |
| Student Trans.             |                                   |
| Roster                     | School Stop Variation             |
| Student Search             |                                   |
| Transpass                  | Comprehensive Students            |
| Homeroom<br>Transpass List |                                   |
| General Transpass          | Schools                           |
| List                       |                                   |
| All Students               | Trans. Statistics                 |
| School Stop Variation      |                                   |
|                            | School Stops                      |
| Attendance Log             |                                   |
| Comprehensive              |                                   |
| Students                   |                                   |
| > 🗆 Runs                   |                                   |
| V 🗹 Schools                |                                   |
| Trans. Statistics          |                                   |
| School Stops               |                                   |

### **Deleting Report Profiles**

In addition to creating and editing, you can always delete an existing Report Profile.

To Delete an existing Report Profile (steps 1 to 3 are identical to those followed to create new Report Profiles):

- 1. Click on the **Reports** tab to access the Reports Tool.
- 2. Click on the **Profiles** tab to access the Profiles section.
- 3. Expand the **Action** menu by clicking on it. New and Edit buttons are displayed.
- 4. Click on the **Edit** button. A new window appears.
- Click **Delete**. Be aware that, once you click Delete, the Profile is instantly removed without warning.

|                      | <b>→</b> <sup>+</sup>                      |                         |
|----------------------|--|-------------------------|
| COMPASS              | Reports                                    | Reports                 |
| Administration       | Menu Profiles 2                            | Menu Profiles           |
| Inspection Templates | Profile: Admin                             | Profile: Admin   Action |
| Inspection History   | Select All Deselect All                    | + New 4                 |
| Users                | Save                                       | Save                    |
| Roles                | Menu:<br>Builder<br>Ø Routes               | Reports                 |
| Reports              | > ፼ Runs<br>> ፼ Students                   | Menu Profiles           |
| Scenarios            | ✓ Ø Schools<br>Ø Trans.<br>Statistics<br>Ø | Profile: Admin          |
| Global Settings      | School<br>Stops<br>V Ø Actions             |                         |
| Login History        | <b>∂</b><br>Analyst                        |                         |

### **AUTOMATIC VEHICLE LOCATION**

### Configuring AVL in Compass

### Adding an AVL Account

Before you can use the AVL module, you'll need to set up AVL for your vehicles in Compass Administration. To do this, you'll need to:

AVL

AVL

AVL

AVL

New AVL Account

AVL Account Name

- 1. Go to Compass Admin > AVL Accounts and click New.
- 2. Enter details of your AVL account:
  - Account Name: enter any name to easily identify the AVL account. Typically the name is the GPS provider (i.e. Zonar).
  - AVL **Data Source**: pick your GPS provider from the list.
  - AVL Account URL: enter the web address given by your GPS provider here.
  - AVL Login/Password: enter the credentials given by your GPS provider.
- 3. Click **Save** to add the new AVL account, then close Compass Admin and return to Compass Route Builder

| Data Source           | Select Data Source |
|-----------------------|--------------------|
| Account URL           |                    |
| Account Login         |                    |
| Account Password      | ••••••             |
| 🗧 Back to list 🗟 Save |                    |

### NOTE: Zonar Data Source

If using Zonar as a Data Source, an extra Device ID Field option appears. Consult with your GPS provider (Zonar) as to whether you're using fleet or exsid, and select from the list.

| New AVL Account       |       |                  |
|-----------------------|-------|------------------|
| AVL Account Name      |       |                  |
| AVL Data Source       | Zonar | v                |
| AVL Account URL       |       |                  |
| AVL Account Login     | cps   |                  |
| AVL Account Password  | ••••• |                  |
| Device ID Field       | fleet | T                |
|                       |       |                  |
| Back to list     Save |       | Appears if Zonar |
|                       |       | is Data Source   |
|                       |       |                  |

### Linking AVL Account to Vehicle

Back in Compass Route Builder, you'll need to link the AVL Account you created to the vehicles in Compass. To do this:

| -   |                |                                |                  |        |               |           |           |       |      |
|---|----------------|--------------------------------|------------------|--------|---------------|-----------|-----------|-------|------|
| COMPASS Route Builder<br>2019/10 1723156152   |                |                                |                  |        |               |           |           |       |      |
| 🗚 Schools 🚧 Barriers 🎓 Depots   | 🕞 Stop         | s 😭 VIM 🔹                      | <b>ও</b> Tiering | 🛢 Data | a 🗸 💼 Repo    | orts 🗸 📲  | SSD Porta | ι 🏟 Α | dmin |
| Routes Runs Stops Vehicles Workspace  | e Result       | Students Actio                 | n Requests       | AVL    |               |           |           |       |      |
| Please Select A Vehicle Profile:  | Default Profil | le 🔻                           |                  |        |               |           |           |       |      |
| 2 Schools Check All Schools 9999 - 0010 - 00000 - With Wheelchairs Spare With AVL/Ge Number Attributes Vehicle with no runs from dd/mm/yyyy Teirid Clear Filters and Results Add to V | through dd     | TY<br>A<br>Vehicle<br>/mm/yyyy | e Configurati    | Aide   |               | ×         |           |       |      |
| <b>Find</b> Clear Filters and Results Add to V  | Workspace      | Add to Watch                   | Profiles         | New    | Bulk Update   | Delete    |           |       |      |
| VEHICLES (105)  |                |                                |                  |        |               |           |           |       |      |
| VEHICLE NUMBER VEHICLE CONF. TYPE   | PROFILE        | AFTER BEFORE                   | DEPOT            | USE TY | PE MAX. STOPS | MAX. TIME | RDR       | WC SV | BL   |
|   | Default Pro    | 4:00 AM 6:00 PM                | CLASS I          |        | 30            |           | 72 (      | 0     | 0    |
|   | Default Pro    |                                | CLASS I          |        | 30            |           | 72 (      | 0     | 0    |
| 3B149   | Default Pro    |                                | CLASS I          |        | 30            |           | 72 (      |       | 0    |
| 88150   | Default Pro    | 4:00 AM 6:00 PM                | PHILLY TRA       |        | 30            |           | 30 6      | 0     | 0    |

- 1. Go to the Vehicles tab.
- 2. Select With AVL/GPS.
- To find all vehicles that have AVL/GPS installed, click on the Find button.
- 4. Click the **Edit Vehicle** icon to open the Vehicle Details window.

| VEHICLE DET                             | AILS        |                                  | ×       |
|---|-------------|----------------------------------|---------|
| Profile: Defau                          | Ilt Profile |                                  |         |
| Vehicle #                               | 3B148       | Notes                            |         |
| Spare Veh                               | icle        | Stall #                          |         |
| AVL Device                              | 2000043E    | Odometer                         |         |
| 6 AVL Account                           | SEON96      |                                  |         |
| Max Riders                              | 72          | Wheelchairs                      | 0       |
| Seat Belt                               | 0           | Safety Vest                      | 0       |
| Max Stops                               | 30          | Max Route<br>Time (Min.)         |         |
| Max Drive<br>Time (Min.)                |             | Max Total<br>Distance<br>(Miles) |         |
| Start After                             | 4:00 AM     | Start Before                     | 6:00 PM |
| Start Depot                             | CLASS I     | End Depot                        | CLASS I |
| Max Occupy<br>%                         | 100         | Time Weight                      |         |
| Distance<br>Weight                      |             | Fixed Cost                       |         |
| Vehicle Type                            | T           | Operating<br>Cost/Hour           | 0       |
| Operating<br>Cost/Mile                  | 0           | Vehicle<br>Configuration<br>Type |         |
| Vehicle<br>Inspection<br>Classification | •           | Specialties<br>AC                | *       |
| VIN Number                              | 1HVBBA      | Aide                             |         |
| Year                                    | 2004 🗘      |                                  |         |
| Type of                                 |             |                                  | *       |
|   |             | Close                            |         |

- In the AVL Device ID field, enter the device ID of your GPS unit. This needs to match the Device ID of the unit in your AVL provider's website. Refer to your AVL provider for more information.
- 6. In the AVL Account field, select the **AVL Account** you created in Compass Admin.
- 7. Click **OK** to associate AVL to this vehicle. Repeat this process for all vehicles that have GPS installed.

### Tracking Vehicles in Real Time

To begin real-time tracking using AVL, log into the Compass Route Builder application and choose your Scenario. Then:

| 😭 Schools 🖾 Barriers 🎓 Dep   | ots 🐵 Stops 🛛 📮 VIM   | 🐨 Tiering 🛛 🛢 Data                              | 🗸 💼 Reports 🗸  | 💄 SSD Portal  | 🏚 Ad        |
|--|---|---|--|---|-------------|
| Routes Runs Stops Vehicles Works   | pace Result Students A  | ction Requests AVL                              |  |   |             |
| Please Select A Vehicle Profile:   | Default Profile 🔻   |   |  |   |             |
| Schools  | Depots  | Specialties                                     |  |   |             |
| Check All Schools  | ALT DEPOT   | ▲ AC  | <b></b>  |   |             |
|  | MAIN DEPOT  | Aide  |  |   |             |
|  |   |   |  |   |             |
| With Wheelchairs Spare 🗹 With AVL  | /GPS  |   |  |   |             |
| Number Attributes  |   | icle Configuration Type                         | •  |   |             |
| Vehicle with no runs from dd/mm/yyyy   | through dd/mm/yyyy  |   |  | Ý   |             |
| Find Clear Filters and Results Add   | to Workspace Add to Wate  | h Profiles New                                  | Bulk Update Delete   |   |             |
| VEHICLES (12)  |   |   |  |   |             |
| VEHICLES (12)  | PE PROFILE AFTER BEFOR  | RE DEPOT USE TYPE                               | MAX. STOPS MAX.  | TIME RDR W  | c sv        |
|  | Default Pro_ 6:00 AM 8:00 P   |   | 50   | 90 0  | 0           |
| 24   | Default Pro_ 6:00 AM 6:00 P   |   | 50   | 90 0  | 0           |
| 🕑 📸 35   | Default Pro. 6:00 AM 8:00 P   | M MAIN DEPOT                                    | 50   | 70 0  | 0           |
| 40   | Default Pro_ 6:00 AM 8:00 P   |   | 50   | 9 O   | 0           |
| S 10 58  | Default Pro 6:00 AM 8:00 P  | M MAIN DEPOT                                    | 50   | 90 0  | 0           |
| Route Builder         Barriers       Dep         Routes       Runs       Stops       Vehicles       Works  |   | ♥ Tiering ■ Data                                | ✓ 💼 Reports ✓  | SSD Portal  | <b>\$</b> A |
| Route Builder<br>201940 1723162178<br>Routes Runs Stops Vehicles Works   | pace Result Students Ar   | ction Requests AVL                              | ✓ 💼 Reports ✓  | SSD Portal  | ¢ A         |
| Routes Runs Stops Vehicles Works   | ages Alerts Clear Mesg  | ction Requests AVL                              | ✓ 💼 Reports ✓  | SSD Portal  | <b>\$</b> A |
| Routes Runs Stops Vehicles Works   | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    |  |   |             |
| Route Builder<br>201940 1723152178<br>Parriers Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess   | ages Alerts Clear Mesg  | s Live Video                                    | Reports     A  | S ID LAT LON  |             |
| Route Builder<br>201940 1723162178<br>P Schools P Barriers Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>START VEHICLE IST RUN<br>START VEHICLE IST RUN<br>23<br>24   | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | HAZARD ODOM. GP<br>200<br>200                                    | <b>5 ID LAT LON</b><br>100  |             |
|  | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | HAZARD ODOM. GP<br>200<br>200<br>200                             | <b>S ID</b> LAT LON<br>100<br>100   |             |
| Route Builder<br>201940 1723162178<br>P Schools P Barriers Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>START VEHICLE IST RUN<br>START VEHICLE IST RUN<br>23<br>24   | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | HAZARD ODOM. GP<br>200<br>200                                    | S ID LAT LON<br>100<br>100<br>100   |             |
| Route Builder<br>201940 1723162178<br>PM Schools PM Barriers P Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>START VEHICLE IST RUN<br>23<br>23<br>24<br>23<br>24<br>23<br>24<br>23<br>24<br>23<br>24<br>23<br>23<br>24<br>23<br>24<br>23<br>24<br>23<br>24<br>25<br>26<br>27<br>27<br>26<br>27<br>27<br>27<br>27<br>27<br>27<br>27<br>27<br>27<br>27  | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | HAZARD ODOM. GP<br>200<br>200<br>200<br>200<br>200               | SID LAT LON<br>100<br>100<br>100<br>100<br>100  |             |
| Route Builder<br>201940 1723162178<br>PM Schools PM Barriers Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>START VEHICLE IST RUN<br>START    | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | 1AZARD ODOM. GP<br>2000<br>2000<br>2000<br>2000<br>2000<br>2000  | SID LAT LON<br>100<br>100<br>100<br>100<br>100  |             |
| Route Builder<br>Zots 40 1723162178<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>Start VEHICLE IST RUN<br>START START<br>COMPASS Route Builder   | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | 1AZARD ODOM. GP<br>2000<br>2000<br>2000<br>2000<br>2000<br>2000  | SID LAT LON<br>100<br>100<br>100<br>100<br>100  |             |
| Route Builder<br>20040 1723162178<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>START VEHICLE IST RUN<br>START VEHICLE IST RUN   | pace Result Students Ar<br>ages Alerts Clear Mesg   | s Live Video                                    | 1AZARD ODOM. GP<br>2000<br>2000<br>2000<br>2000<br>2000<br>2000  | SID LAT LON<br>100<br>100<br>100<br>100<br>100  |             |
| Route Builder<br>ZOURAO 1723162178<br>PM Schools PM Barriers Dep<br>Routes Runs Stops Vehicles Works<br>Vehicle Watch Clear Watch Mess<br>Vehicle Watch - NOT LISTENING FOR MESS   | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME   | s Live Video                                    | HAZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200       | SID LAT LON<br>100<br>100<br>100<br>100<br>100  | UT          |
| Route Builder<br>ZOBAO 1723162178<br>PM Schools PM Barriers Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>COMPASS<br>COMPASS<br>Route Builder<br>201940 1723162178  | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME   | ction Requests AVL                              | HAZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200       | S ID LAT LON<br>100<br>100<br>100<br>100<br>100<br>100<br>100<br>100  | UT          |
| Route Builder<br>20040 1723182178<br>P Schools P Barriers Dep<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>START VEHICLE IST RUN<br>START VEHICLE IST RUN<br>STA | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME   | ttion Requests AVL S Live Video Power HEADING ► | HAZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200       | S ID LAT LON<br>100<br>100<br>100<br>100<br>100<br>100<br>100<br>100  | UT          |
| Route Builder<br>20040 1723182179<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE IST RUN<br>START VEHICLE IST RUN<br>START VEHI   | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME   | ttion Requests AVL S Live Video Power HEADING ► | AZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200<br>200 | SID LAT LON<br>100<br>100<br>100<br>100<br>100<br>100<br>100  | UT<br>• A(  |
| Route Builder<br>ZOURAO 1723162178<br>Routes Runs Stops Vehicles Works<br>Vehicles Watch Clear Watch Mess<br>Vehicle Watch - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTE   | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME<br>ts @ Stops Q VIM<br>ace Result Students Ac                         | tion Requests AVL                               | HAZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200       | SID LAT LON<br>100<br>100<br>100<br>100<br>100<br>100<br>100  | UT<br>• A(  |
| Route Builder<br>ZOURAO 1723162178<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>Start Watch - NOT LISTENING FOR MESS<br>Start VEHICLE IST RUN<br>Start VEHICLE IST RUN<br>Star   | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME<br>ts @ Stops Q VIM<br>ace Result Students Ac                         | tion Requests AVL                               | AZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200<br>200 | SID LAT LON<br>100<br>100<br>100<br>100<br>100<br>100<br>100  | UT.         |
| Route Builder<br>ZOURAD 1723162178<br>Routes Runs Stops Vehicles Works<br>Start Watch Clear Watch Mess<br>Start VehicLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>VEHICLE WATCH - NOT LISTENING FOR MESS<br>Start VehicLE IST RUN<br>Start VehicLE IST RUN<br>Start VehicLE IST RUN<br>Start VehicLE IST RUN<br>Start VehicLE Start<br>Start VehicLE Builder<br>201940 1723162178<br>Particle Watch Messa<br>Stop Watch Clear Watch Messa<br>VehicLE WATCH LISTENING FOR MESSAGES.   | ages Alerts Clear Mesg<br>AGES<br>ZONE SPEED TIME<br>ts Stops Q VIM<br>ace Result Students Ac<br>ges Alerts Clear Mesge | ttion Requests AVL                              | AZARD ODOM. GP4<br>200<br>200<br>200<br>200<br>200<br>200<br>200 | SID LAT LON<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100.<br>100. | ¢ A         |

- 1. Click on the Vehicles tab.
- 2. Check the With AVL/GPS box.
- Click Find. All vehicles that are equipped with AVL will appear in the list. Select the vehicle to be tracked.
- Click Add to Watch. The vehicle(s) you selected will load in the AVL Module.

- Click on the AVL tab. The vehicle(s) you selected will appear in the Vehicle Watch List.
- Click the Start button to begin tracking vehicles in real time.

 The AVL module will show Listening For Messages, indicating that the system is monitoring for real-time activity.

Click **Stop** to stop tracking in real time.

Vehicles with real-time GPS activity will show up as yellow dots on the map. If you hover your mouse over a yellow dot, you'll see information about that vehicle, including the vehicle name, device ID and speed and direction of that vehicle.

| *                                      |      |   |       |      |             |         |          |       |             |    |            |      |  |  |
|--|------|---|-------|------|-------------|---------|----------|-------|-------------|----|------------|------|--|--|
| St                                     | Stop |   | Watch |      | Clear Watch |         | Messages |       | Clear Mesgs |    | Live Video |      |  |  |
| VEHICLE WATCH - LISTENING FOR MESSAGES |      |   |       |      |             |         |          |       |             |    |            |      |  |  |
| ÷                                      |      |   | STAR  | r vi | EHICLE      | IST RUN | ZONE     | SPEED | TIME        | PC | OWER       | HEAD |  |  |
|  | 9    | 8 |       | 23   | 3           |         |          |       |             |    |            |      |  |  |
|  | Q    | 8 |       | 24   | 4           |         |          |       |             |    |            |      |  |  |
|  | Q    | 8 |       | 23   | 7           |         |          |       |             |    |            |      |  |  |

9. Click the **Search** icon in the Vehicle Watch table to highlight the vehicle on the map. The vehicle icon will change to a red dot.

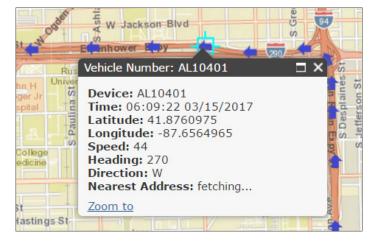
### Viewing AVL History

In addition to real-time tracking, the AVL module let's you view a vehicle's complete travel history for a certain time period. To view a vehicle's AVL history:

- 1. Click on the **AVL** tab in Compass Route Builder.
- 2. In the **GPS Based Path History** section of the options, select the Date, Start and End times, and the Vehicle number you wish to view AVL history for.
- 3. Click **Display Map Path** or **Display Path Table**, depending on your preferences.
- 4. The vehicle history will appear on the map as blue arrows. Each arrow represents a single GPS record.
- Routes Runs Stops Vehicles Workspace Result Students Action Requests AVL GPS Based Path History Date: 6/21/2019 Ö Start: 05:00 AM End: 07:00 PM Use Geofence Display Path Table Display Map Path Vehicle # Apply speed threshold coloring Mph 3 Clear Events Clear Path Sensors REC Recording 🗌 🚥 Stop arm - 🏄 Video Loss



5. Click on the arrow to view information about that record, including the date and time of event, as well as speed and direction of the vehicle at that time.



## **Applying History Filters**

#### About AVL Filters

Running an AVL history can produce hundreds of records each day. With so many records, it might be difficult to pinpoint a specific event in time. By using filters you can easily identify when a specific event occurs.

There are two main types of filters in the AVL module: Speed and Sensor.

#### **Identifying Speeding Events**

The **Speed Threshold** filter can be used to identify whenever a bus travels above a safe speed limit previously determined. To identify a speeding vehicle:

- 1. Check the **Apply speed threshold coloring** box and enter a value in the threshold field.
- 2. Click **Display Map Path** to show the results on the map.

| Routes Runs Stops Vehicles W   | orkspace Result | Students Action  | Requests AVL       |   |
|--------------------------------|-----------------|------------------|--------------------|---|
| GPS Based Path History         |                 |                  |                    | * |
| Date: 6/21/2019                |                 | Start: 05:00 AM  | End: 07:00 PM      |   |
| Vehicle #:                     | Use Geofence    | Display Map Path | Display Path Table |   |
| Apply speed threshold coloring | Mph             |                  |                    |   |
| Clear Path Clear Events        |                 |                  |                    |   |
| Sensors                        |                 |                  |                    |   |
| REC Recording                  | •               |                  |                    |   |
| 🗆 🚥 Stop arm                   |                 |                  |                    |   |
| 🗆 🚀 Video Loss                 | •               |                  |                    |   |

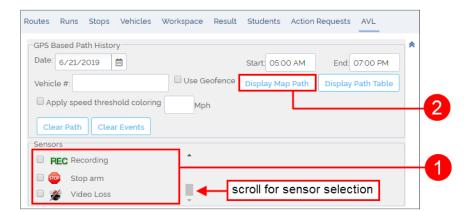
3. On the map, you'll see a red arrow indicating the speeding events. Click on a red arrow to see when and where the event occurred, as well as how fast the vehicle was going.



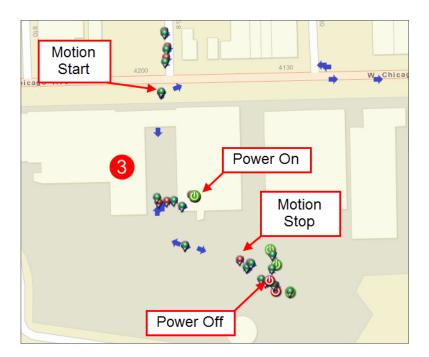
#### **Viewing Sensor Events**

Similar to speeding events, the Sensor Events filter allows you to view specific telematic with the AVL module. For example, you can view the times when the bus deploys a stop arm, opens the door, starts and stops movement, etc. To view sensor events:

- Scroll up/down to select the sensors you want to include in the Path History from the Sensors menu.
- 2. Click **Display Map Path** to show the results on the map.



3. The sensor events appear on the map, each unique icon representing a specific event.



## **CUSTOMER SERVICE**

 Technical Support:
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 service@seon.com

# **PRODUCT INFORMATION**

For product information and documentation, please visit <u>https://community.seon.com/</u> Please contact Technical Support if you do not have access credentials.

## WARRANTY AND END-USER LICENSE AGREEMENT

Complete warranty details are available at <a href="http://www.seon.com/documents/Seon-Warranty.pdf">http://www.seon.com/documents/Seon-Warranty.pdf</a>