



**Surveillance & Fleet Management Solutions for Student Transportation**

**COMPASS DISPATCH  
USER MANUAL**

## Table of Contents

COMPASS DISPATCH .....	1
Introduction.....	3
System Requirements.....	3
Opening Dispatch.....	4
Dashboard .....	5
Calendar .....	6
Inbox .....	7
Fields.....	7
Inbox Appearance and Tools.....	8
Creating a Dispatch.....	10
Recurring dispatch .....	14
Vehicles.....	15
Maintenance .....	16
Users .....	18
Create a new User .....	18
FAQ.....	20

## **Introduction**

Compass Dispatch is an easy to use solution for Dispatch personnel to track:

- scheduled absences of contracted drivers (appointments, requested time-off, etc.)
- long-term absences of contracted drivers (family leave, injury leave, etc.)
- unscheduled absences of contracted drivers (call-ins)
- substitute drivers assigned to cover the routes for long-term absences
- substitute drivers assigned to cover scheduled absences
- substitute drivers assigned to cover unscheduled absences
- field trip assignments
- schedule by AM/PM/Midday portions of a route to accommodate District work assignment rules

## **System Requirements**

Application requirements are as follows:

### **2.1 Software Requirements**

- Internet Explorer (v 8.0 or higher), Google Chrome (v 10.x.xxx.xxx), Mozilla Firefox (v 2.0 or higher), Apple Safari (v 4.0 or higher)
- It is best viewed on a 1024 x 768 Screen resolution or higher
- Microsoft Excel to view printer- friendly reports.
- Network connectivity to the server hosting the application

### **2.2 Recommended Hardware Requirements**

- Processor: 1 GHz Processor or higher
- Memory: 2 GB or more
- Disk Space: At least 5 GB or more

## Opening Dispatch



1. Open the sign in screen for [Your Guide To Transportation](#) using the link which was provided by your implementation team.
2. Sign in using the user name and password.

User Name

Password

[Forgot Password?](#)

\*\*\* If you forget your password, click on the link. A dialog box will open asking for your User Name.

Forgot Password ×

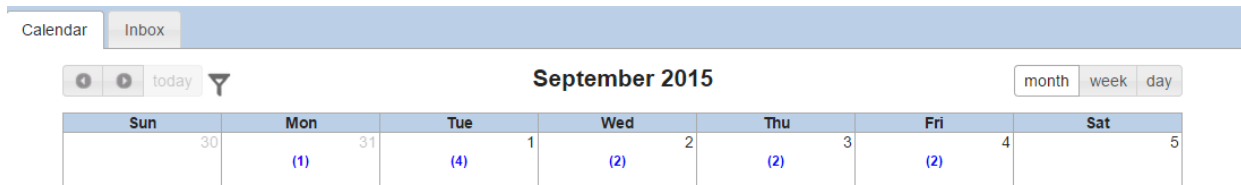
Please enter the Login ID of your account. A new temporary password will be emailed to the address linked to the account.


Login


Or call Support.

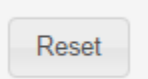
# Dashboard

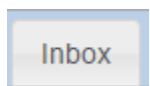
Compass Dispatch opens to a Dashboard calendar of the current month. At a glance the user can see the number of dispatches for each day. The tab to enter the Inbox is also on the Dashboard.



Use the  buttons to move forward or backward a month at a time on the calendar.

Use the filter tool  to filter specific information on the calendar such as only field trips or no shows. Click

on  in the Filter By dialog to clear the filters.



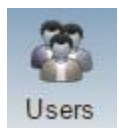
Click on the Inbox tab on the Dashboard page to open the Inbox.



Click on the Vehicles icon to proceed to the Vehicles information page.



Click on the Maintenance icon to proceed to the Maintenance screen to add and delete Dispatch Types, Route names/numbers, Route Types such as AM, PM, and Location which refers to location of depots/vehicle storage.

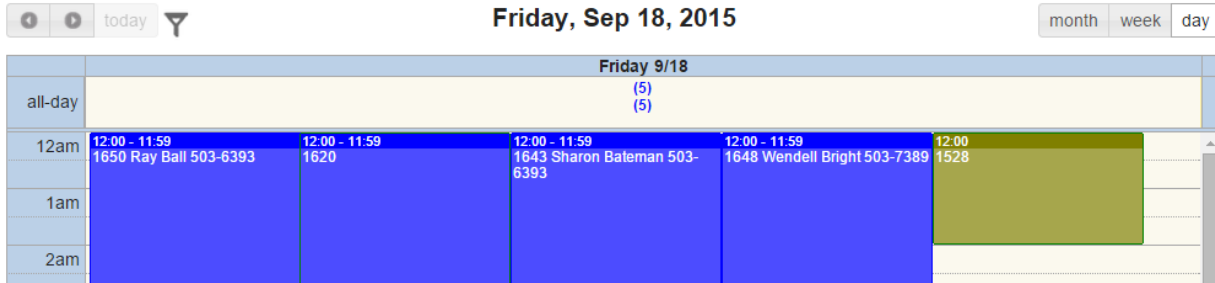


Click on the Users icon to open the Users page to add, edit, delete personnel in the system.

# Calendar

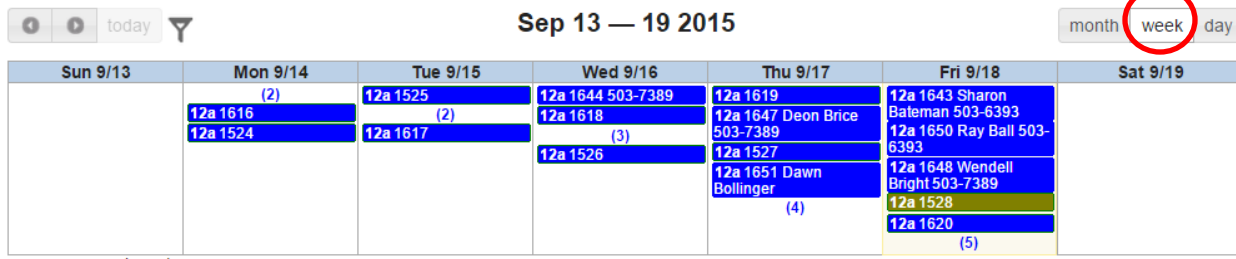
The calendar shows at a glance the dispatches currently scheduled for each day.

1. Click on the number, such as (4), on any day to see the dispatches for that day on a calendar view for the day. All dispatch numbers will be shown along with their duration, vehicle and driver information if completed on the dispatch, and color coded by the trip type.



NOTE: Only the Dispatch Types for the colors on the legend will display in any color but blue.


2. Click on the week tab to see all dispatches for a week.



3. Click on the Month tab to return to the full month calendar and Dashboard page.



4. Use the   buttons to move forward or backward a month at a time on the calendar.

5. Use the filter tool  to filter specific information on the calendar such as only field trips or no shows.

Click on  in the Filter By dialog to clear the filters.

## Inbox

The Dispatch Inbox shows all dispatches that have been created and has many tools and features.

## Fields

<u>Dispatch ID</u>	<u>Location</u>	<u>Departure Date Time</u>	<u>Return Date Time</u>	Vehicle	<u>Driver</u>	<u>Type</u>	<u>Route</u>	<u>AM/PM</u>	Comments	Driver Notified
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1. Any field whose name is underlined may be sorted by clicking on the field name.
2. Each dispatch is given a Dispatch ID number when it is created. If a dispatch is edited, the original is considered a “deleted” dispatch and a new Dispatch ID number is given to the edited dispatch.
3. The Location refers to the location of the vehicle origination.
4. Departure Date Time/Return Date Time refer to the beginning and ending dates and times of a dispatch.
5. Type of Dispatch refers either to the type of trip, such as a field trip, or why a dispatch is being created such as a driver absence creating the need to cover a route.
6. Route refers to the Route # being covered if it is a route rather than a Field Trip.
7. The Comments field allows the user to add notes regarding the need for the dispatch, date and time dispatch is created, creator of the dispatch or any other information deemed important.
8. The Driver Notified field is an opportunity for the users of Dispatch to note the substitute has been assigned and notified. It is “at a glance” information for the Dispatch user.

## Inbox Appearance and Tools


1. The lines of the Dispatch inbox may have different colors:

- a) If the line is yellow, there is incomplete information for the trip. In this illustration no driver has been assigned to the trip. If/When a driver is assigned, the trip will turn white. The same applies to missing vehicle information.

<u>Dispatch ID</u>	<u>Location</u>	<u>Departure Date Time</u>	<u>Return Date Time</u>	<u>Vehicle</u>	<u>Driver</u>
<a href="#">1651</a>	District Office	09/17/2015 12:00AM	09/17/2015 11:59PM		Dawn Bollinger
<a href="#">1650</a>	District Office	09/18/2015 12:00AM	09/18/2015 11:59PM	503-6393	Ray Ball
<a href="#">1648</a>	District Office	09/18/2015 12:00AM	09/18/2015 11:59PM	503-7389	Wendell Bright
<a href="#">1647</a>	District Office	09/17/2015 12:00AM	09/17/2015 11:59PM	503-7389	Deon Brice
<a href="#">1644</a>	District Office	09/16/2015 12:00AM	09/16/2015 11:59PM	503-7389	

- b) The background in the Dispatch Inbox will be either white or blue for dispatches with complete information. The lines will be white and blue, alternating, for the ease of the reader following information across the page.

<a href="#">1648</a>	District Office	09/18/2015 12:00AM	09/18/2015 11:59PM	503-7389	Wendell Bright	Sick Day
<a href="#">1647</a>	District Office	09/17/2015 12:00AM	09/17/2015 11:59PM	503-7389	Deon Brice	Sick Day
<a href="#">1646</a>	District Office	09/17/2015 12:00AM	09/17/2015 11:59PM	503-9590	Dawn Bollinger	Sick Day
<a href="#">1645</a>	District Office	09/18/2015 12:00AM	09/18/2015 11:59PM	503-6393	Ray Ball	Sick Day
<a href="#">1644</a>	District Office	09/16/2015 12:00AM	09/16/2015 11:59PM	503-7389		Sick Day
<a href="#">1643</a>	District Office	09/18/2015 12:00AM	09/18/2015 11:59PM	503-6393	Sharon Bateman	No Show

2. Use the filter tool  to filter specific information in the Inbox by date range, vehicle location, dispatch type, Route #/identifier, driver, etc.


Reset

Click on  in the Filter By dialog to clear the filters.

Deleted Dispatches may be added to the inbox in the Filter Box by checking

**Include Deleted Dispatches:**

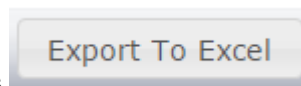
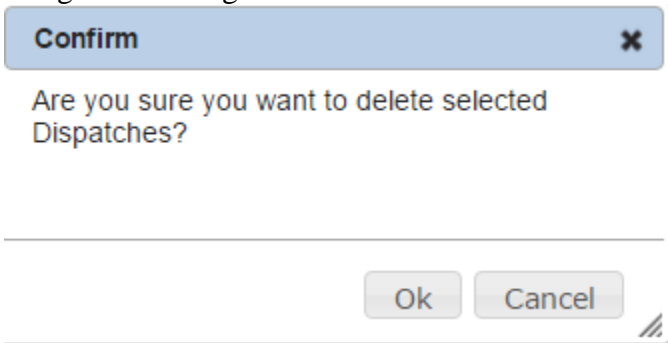
. Resetting the filters will eliminate the deleted dispatches from the list.

3. Use  to delete selected dispatches.



<a href="#">1516</a>	Transportation Office	09/02/2015 12:00AM	09/02/2015 12:00AM			Sick Day	Rt 5	ALL DAY	Maternity leave for Sally Nr		<input checked="" type="checkbox"/>
<a href="#">1517</a>	Transportation Office	09/03/2015 12:00AM	09/03/2015 12:00AM			Sick Day	Rt 5	ALL DAY	Maternity leave for Sally Nr		<input checked="" type="checkbox"/>

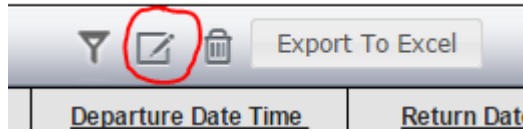
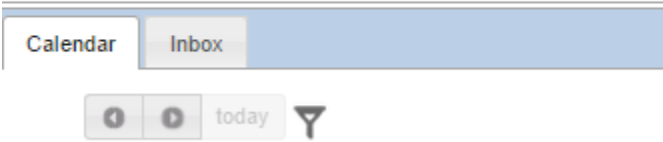
The dialog box to Confirm before anything is deleted. Of course, Deleted Dispatches may always be found using the Filtering Tool and the **Include Deleted Dispatches:**  function.



4. Export the data in your Inbox by clicking on the **Export To Excel** button.  
 NOTE: The Export to Excel function exports all records currently in your Inbox. Filters on the Inbox, or lack of a filter, will determine what data is exported.

## Creating a Dispatch

1. Open the Dispatch application and click on the Inbox tab.



2. To create a new dispatch, click on Departure Date Time or Return Date to open the form:

**New Dispatch** [X]

Start Date Time

End Date Time

Location

Type

Route

AM/PM

Driver

Vehicle

Recurrence  
Recurring  No  Yes

Driver Notified

Comments

Save Cancel

3. Complete the form as follows:

**A. Start Date Time:**

09/01/2015 07:00 am

September 2015

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Time 07:00 am

Hour

Minute

Now Done

As soon as you click in the box, the calendar will open along with times in hours and minutes.

Click **Done** when you have entered the time.

**SUGGESTION:** You can set this up as the time the bus is to leave, or the time the substitute is to clock in prior to pre-trip.

**B. End Date Time:**

09/01/2015 07:00 am

09/01/2015 10:15 am

September 2015

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Time 10:15 am

Hour

Minute

Now Done

The calendar will open with the same date highlighted. Use the Hour and Minute function to schedule the return time.

Click **Done** when you have entered the time.

**HINT:** The hour and minute slide bars can be moved with your arrow keys.

C. Select the location of the vehicle from the drop down menu:

Location  ▼  
Bashas  
Cannobello Gramling School

D. Select the "Type" of trip from the drop down menu:

Type  ▼  
Route  ▼  
AM/PM  ▼

E. Is it a scheduled Route? If so, select the Route # from the drop down menu:

Route  ▼  
AM/PM  ▼  
Route 3

If it is a field trip or other type of trip, skip this field.

F. Does only a part of the day, AM/PM/MIDDAY, or ALL DAY need to be covered? Select the option out of the drop down box:

AM/PM  ▼  
Driver  ▼  
Vehicle  ▼

**SUGGESTION:** If it is a Route that has no mid-day or mid-day runs are assigned separately, just select "ALL DAY" from the list.

**\*\*Additional options may be easily added by Administrative Personnel into the system.\*\***

G. If you know who the substitute assigned for the work is, and what vehicle will be assigned, fill in the boxes:

Driver  ▼  
Vehicle  ▼  
Recurrence  ▼  
Recurring  ▼  
Driver Notified  ▼

**HELPFUL INFO:** As soon as you start to type the name, the program will give you a list!

Vehicle  ▼  
Recurrence  ▼  
Recurring  ▼  
Driver Notified  ▼

**SUGGESTION:** You can skip this and come back later when you have found an available driver and vehicle for the trip.

**H.** Is it a recurring trip? For example, a driver is out because of on-the-job injury, maternity leave, or planned surgery. You can schedule the entire absence at once. (See Recurring Dispatch section for details.) If not, skip

Recurrence  
Recurring  No  Yes

this box.

**I.** If you have already assigned a driver and vehicle (See Step **G**), put a check in this box. Otherwise, skip for now.

Driver Notified

**J.** Use the Comments field for pertinent information and/or initials of creator.

**SUGGESTION:** If you want to keep track of who is creating the dispatches and/or assigning drivers and vehicles, use the Comments field and have the user add their initials and date to the comments box.

Comments

No call from Sue for absence.  
NR 09/01/2015 5:25 AM

**K.** Save the New Dispatch.

Save

4. After the substitute driver has been notified of the trip, place a checkmark in the Driver Notified  area of the form.

## Recurring dispatch

If it is a recurring dispatch, add the information in the “Recurrence” box.

Recurrence

Recurring  No  Yes

From  To

Mon  Tue  Wed  Thu  Fri

Sat  Sun

1. Complete the From (first date of absence) and To (anticipated return date), and the days of week. A dispatch line will be created for every calendar day the trip will need to be covered when the form is saved.

2. If the decision has been made to have the same driver cover the entire recurring absence, add the information at the time of creation and it will be filled in for every day the driver is absent. If it changes, the individual record may be opened and edited.

3. Save the New Dispatch.

Save

# Vehicles



Click on the Vehicles icon to proceed to the Vehicles information page.



Use the Filter tool to find or view only certain vehicles in the Vehicles window. Filter by the Vehicle number, VIN number, location, type, etc. Previously deleted vehicles may be included in the filter.



Use the New Vehicle Details screen to add vehicles to the fleet.



Use the Delete button to delete selected vehicles

<input checked="" type="checkbox"/>	503-6393		Regular Bus	Blue Bird Corporation	Big yellow
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The Restore button may be used to restore multiple vehicles to the inventory, which were previously deleted and then found in a Filtered search. Select any previously deleted vehicles in the list, and click the Restore button.



The Print button will produce a record for any vehicles which have been selected that may be saved or printed using the tool bar at the bottom of the report..

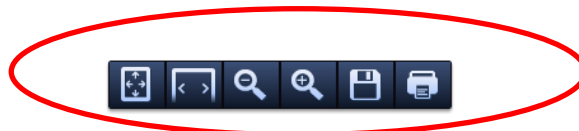
9/18/2015

## Vehicle Details

Vehicle Number : 503-6393	Type : Regular Bus
Location : Transportation Office	Capacity : 54
Owner: State Owned	Manufacturer : Blue Bird Corporation
Vin:	Model : Big yellow
TelePhone :	Oxygen : 0
CarSeat : 0	SafetyVest :
Harness : 0	Wheel Chair : 0
BoosterSeat : 0	Wheel Chair Lifts : 0
Walker : 0	Air Condition :
Tinted Windows :	Seat Belts : 0

## Work Order History

Type	Description	Assigned To	Due Date	Status
30 Day MSI	This Vehicle Maintenance Inspection Work Order is auto generated by Compass Fleet based on the Vehicle Inspection Schedule.		8/3/2015 6:1	New



The copy button will copy all the general details, such as vehicle type, manufacturer, owner, location, of a selected vehicle into a new vehicle record. The new record must then have specific information completed for the vehicle including the vehicle number, VIN, tag #, etc.

## Maintenance



Click on the Maintenance icon to proceed to the Maintenance screen to add and delete Dispatch Types, Route names/numbers, Route Types such as AM, PM, and Location which refers to location of depots/vehicle storage.

### Types

Click on the Types tab in Maintenance to Add, Edit, or Delete Dispatch Types.

NOTE: Users may add as many different Dispatch Types as they want. However, only the Trip Types in the legend will display in a specific color. Any other Dispatch Types will display in the blue Route color.

12:00 - 11:59 1648 Wendell Bright 503-7389	12:00 - 11:59 1643 Sharon Bateman 503-6393	12:00 1528
--	--	---------------

Sick Day      No Show      Field Trip

**+ Add New Type**

Click the **+ Add New Type** button to add another Dispatch Type. A new line will be added at the top of the table. Type in the new Dispatch Type name and click Save to finish.

Type	Active		
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="✓ Save"/>	<input type="button" value="⊗ Cancel"/>

### Routes

Click on the Routes tab to Add, Edit or Delete Route numbers/Route names.

**+ Add New Route**

Click the **+ Add New Route** button to add another Route number/Route name. A new line will be added at the top of the table. Type in the new Route name and click Save to finish.

Route	Active		
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="✓ Save"/>	<input type="button" value="⊗ Cancel"/>

### Route Types

The Route Type refers to the segment of the day or a special type of trip, such as AM, PM, or a field trip. Click

the **+ Add New Route Type** button to add a new route type. A new line will be added at the top of the



table. Type in the new Route Type and click Save to finish.

Route Type	Active	
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="✓ Save"/> <input type="button" value="⊘ Cancel"/>

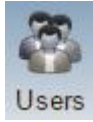
Location

Location refers to the location the vehicles are parked.

Click the  button to add a new location. A new line will be added at the top of the table. Type in the Location and click Save to finish.

Location	Active	
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="✓ Save"/> <input type="button" value="⊘ Cancel"/>

## Users



Click the Users icon to add, edit, delete, copy, print or restore users to the system.



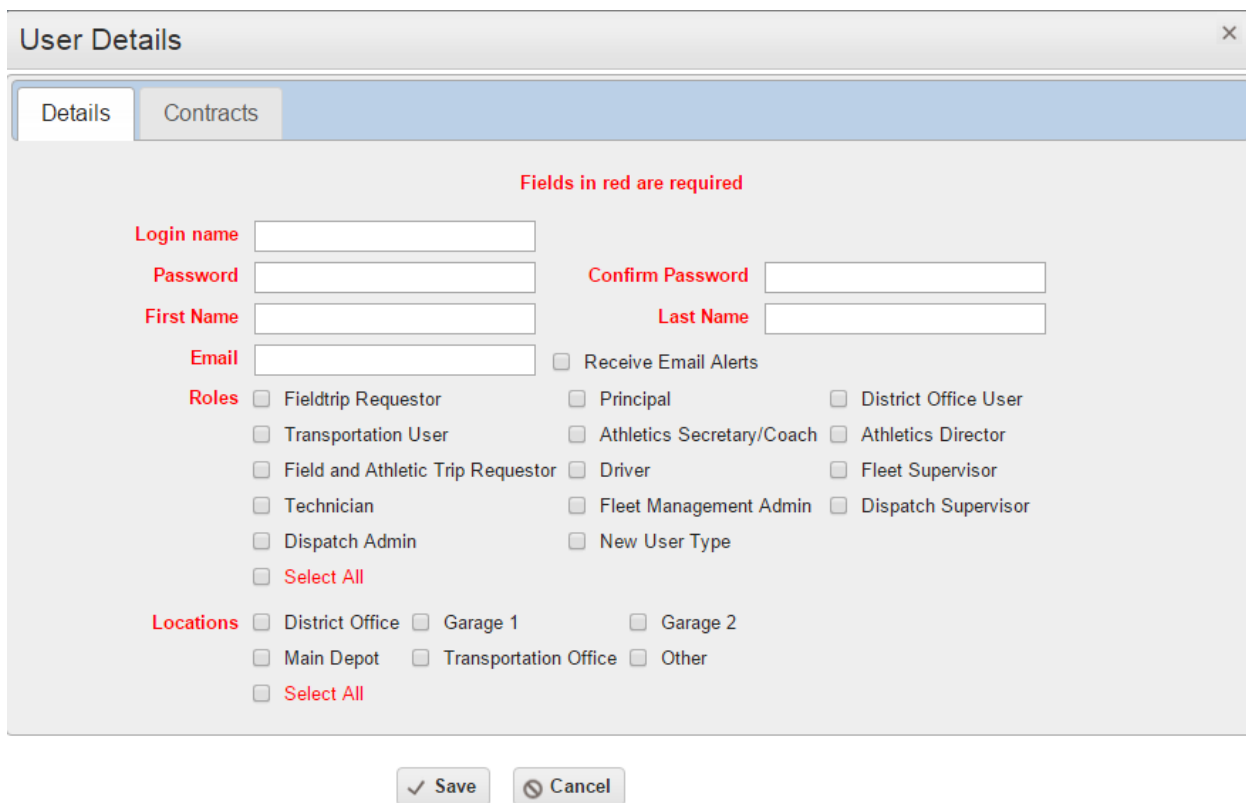
Filter the selection of records in the Users box by First Name, Last Name, part of either first or last name, location or user type. Deleted Users may be included in the search by checking the box.

Include Deleted Users

## Create a new User



1. Click on the New record icon to open the User Details dialog box.



The image shows a 'User Details' dialog box with a close button (X) in the top right corner. It has two tabs: 'Details' (selected) and 'Contracts'. A red warning message states 'Fields in red are required'. The form contains the following fields and options:

- Login name**: text input field
- Password**: text input field
- Confirm Password**: text input field
- First Name**: text input field
- Last Name**: text input field
- Email**: text input field
- Receive Email Alerts
- Roles**: multiple checkboxes for roles:
  - Fieldtrip Requestor
  - Transportation User
  - Field and Athletic Trip Requestor
  - Technician
  - Dispatch Admin
  - Select All
  - Principal
  - Athletics Secretary/Coach
  - Driver
  - Fleet Management Admin
  - New User Type
  - District Office User
  - Athletics Director
  - Fleet Supervisor
  - Dispatch Supervisor
- Locations**: multiple checkboxes for locations:
  - District Office
  - Main Depot
  - Garage 1
  - Transportation Office
  - Garage 2
  - Other
  - Select All

At the bottom of the dialog box are two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with a close icon).


2. All fields in **RED** are mandatory. Complete all mandatory fields. The user will not be able to save the record with incomplete fields.




3. Click to finish.


### NOTES:

1. Email alerts are not generated by Dispatch even though email address is a mandatory field. This is a feature that could be implemented in the future.
2. Though there is a Contracts tab, it is informational in Dispatch and not mandatory.

Click the delete icon  to delete users from future searches of active users.

NOTE: Deleting anything in Dispatch, (users, locations, dispatches,) only moves them to the “background” of the data and they may be searched for and restored at any time using the  **Include Deleted** option in any of the filtered searches.

Click the Restore icon  to restore records to the Users. The users to be restored must first be searched for in a Filtered search. The select the records to restored.

Click on the Print icon  to print records of all selected users.

## FAQ

**1. Why are there different color lines in the inbox?**

The yellow lines are for dispatches which have incomplete information, such as no vehicle or driver. All lines which are complete alternate between white and blue for the ease of the reader to read across the table.

**2. Why don't my vehicle numbers show in the Inbox even though I added them to the dispatch?**

You can type a driver's name or vehicle number into the dispatch. However, it will not save if the name or vehicle isn't listed in the vehicle table or the user table. That's why you're having trouble with your vehicle numbers not populating the table in the inbox.

**3. Can you search for deleted items only?**

Deleted items may be included in searches for users, trips, vehicles but you cannot search for just deleted items.

**4. Can the Legend on the calendar page be changed?**

The legend on the calendar page correlates directly to the Dispatch Types (Field Trip, Route, etc.) However, there is no color/legend assigned to any newly created Trip Types, such as sick leave, no show, or whatever language you are using for your Dispatch Types.