

## Trip Manager Dispatcher Training Checklist for Mobile Computing Platform (MCP) Customers

### 1. Big Picture

- Trip Manager (TM) lets you monitor trips with views that support management by exception
  - TM brings exceptions to your attention
  - You determine their importance
- Start with the big picture and drill down to the specifics that interest you
  - Trips
    - All trips > individual trip > all stops on that trip > specific stop > all tasks for that stop > specific task > driver-entered data for that task
    - Panel or list view (with sortable columns)
  - Drivers
    - All drivers > all trips for a certain driver > specific trip > all stops > specific stop > all tasks for that stop > specific task > driver-entered data for that task
    - Trip status and information about previous, active, and next trips (if available)
    - Specific driver's trips searchable by date range and global group
  - Vehicles
    - All / active / pending / unassigned
    - Plotted on a map
    - Searchable by current proximity to a stop
  - Stops
    - Landmarks from GeoServices
    - Drill down for stop's history
    - Searchable by Georservice stop type
- Trip States
  - Active
    - May be on schedule or behind schedule
    - May have missed tasks, out of sequence Stops, and/or late stops
  - Completed
    - Were either completed on time or completed late
    - May have had missed tasks, out of sequence tasks, and/or late stops
    - Are selectable by date range
  - Pending
    - May be unassigned or assigned but not started
    - May or may not be overdue
    - Are also selectable by date range
- Other trip statuses - Cancelled, Sending in Progress, Failed to Send

- Stop Types
  - Terminal Start / Pickup / Dropoff / Fuel / Terminal Finish / Miscellaneous
  - Default tasks per stop type
  - Mandatory vs. optional
  - Modify defaults and mandatory/optional status from the Stop Setup tab of Admin screen

## 2. Basic Navigation

- Drilling down & breadcrumbs
- Icons & flags (see Help System)
- Map manipulation
- Panel view vs. list view (advantage: sortable)
- Red vs. black
- Global groups (see External Release Notes)
- Help (banner pull-down for *How do I...* tasks, question mark for information in-context)

## 3. Search

- Minimal character entry vs. maximum known information
- Find a specific trip (Trips screen) if you know the global group, the date range *and* route name
- Find vehicles near a specific location (Vehicles screen) as long as location is a geocoded landmark
- Find a specific stop (Stops screen) and view stop history

## 4. Using TM for a Current Snapshot of the Day's Activities

- Home screen
  - Active / Completed / Pending Trips
    - Select what trip state to view
    - Drill down for details
  - Notifications
    - Active / Dismissed / Dismiss All
    - Critical vs. Standard (definitions in Admin > Notifications)
- Trips screen
  - Active / Pending / Completed / Cancelled / Sending in-progress / Failed to send
  - Filters vary by stop type
  - Drill down to specific trip plan > stops on that trip > specific stop > tasks & forms at the stop
- Drivers screen
  - Drivers / current trip status / previous trip / active trip / next trip
  - Drill down to one driver's trips > specific trip > stops > specific stop > tasks & forms at the stop
- Vehicles screen
  - All / active / pending / unassigned vehicles
  - Location of vehicles on an active trip plotted on a map
- Stops screen
  - Find trip plans that included that stop during a specific time frame
  - Drill down to stops / specific stop / tasks and forms / data entered

- Admin screen
  - Check to see if routes are importing successfully
  - Review error explanations

## 5. Basic Tasks

- |   |  |
|---|--|
| <input type="checkbox"/> Assign and send a trip | <input type="checkbox"/> Complete a trip     |
| <input type="checkbox"/> Edit a trip            | <input type="checkbox"/> Add/delete a stop   |
| <input type="checkbox"/> Create a trip          | <input type="checkbox"/> Add a freeform stop |
| <input type="checkbox"/> Cancel a trip          | <input type="checkbox"/> Edit stop data      |

## 6. Important Things to Know

- Notifications
  - Late to Stop, Behind Schedule, and Late Pending Trip require arrival/departure times
  - Retained for two days
- Stops
  - Visible on map only if they exist as landmarks in Geoservices
  - Auto-arrive/depart require landmark geocodes; without them, driver arrives/departs manually
  - Phone/contact information comes from landmark data
- Editing data
  - You CAN
    - Add a trip at any time
    - Add stops to an Active trip
    - Edit any stop on an Active trip, as long as the driver has not arrived
    - Cancel an Active, Pending, Sending in Progress, or Failed to Send trip
    - Edit ANY part of a Completed trip, except driver, vehicle, and planned times
    - Edit ANY part of a Pending trip, including driver and vehicle assignments
  - You CANNOT
    - Add/remove/edit a driver or vehicle from inside Trip Manager – only through QTRACS
    - Add/remove/edit a non-freeform stop from inside Trip Manager – only through GeoServices
    - Edit a stop on an active trip if the driver has already arrived
    - Edit a cancelled trip

## 7. Four Reports

- Trip Summary Report
  - All completed trips during a date range
  - Date / global group / route / driver / trip time & distance duration / vehicle / BOT / EOT
- Driver Trip Report
  - Specific driver on specific route on specific date
  - Stop / actual vs. planned arrive & depart / time at stop / actual vs. planned leg time / leg miles
  - Total trip duration & miles

- Stop Duration Report
  - Dates / routes / drivers / actual vs. planned arrive, depart, & duration / differences by stop
  - Total times stopped there, average arrival & average time at stop differences from plan
- Driver stop duration Report
  - Dates / routes / drivers / actual vs. planned arrive, depart, & duration / differences
  - By driver
- PDF to print, TXT to export/manipulate



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80-JC075-1 Rev. D

November 2014