DISPATCH GUIDE

Setting Up & Managing Journeys

A journey is a vehicle on the road, with a driver, following a route that the planner builds from booked trips. This guide shows how to create a journey, edit an existing one, and deactivate a journey created by mistake.

ROLE	WHERE	COVERS
Dispatch	Journeys › Add Journey	Create · Edit · Deactivate

1. Create a new journey

Step 1. Make sure your role is set to **Dispatch**, then select **Journeys** in the left-side menu.

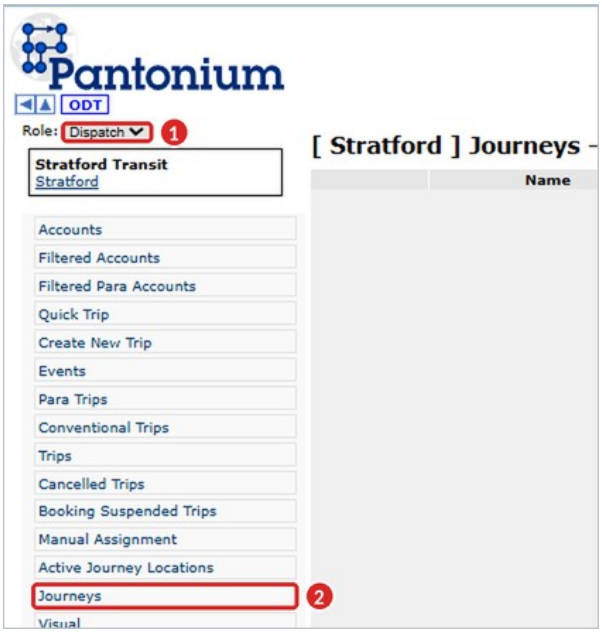


Figure 1: *Select the Dispatch role (1), then Journeys in the left menu (2)*

Step 2. Click **Add Journey** at the top right of the Journeys screen.



Figure 2: *The Add Journey button*

Step 3. The **Create Journey** window opens. Complete the fields in the order below, then click **Ok**.

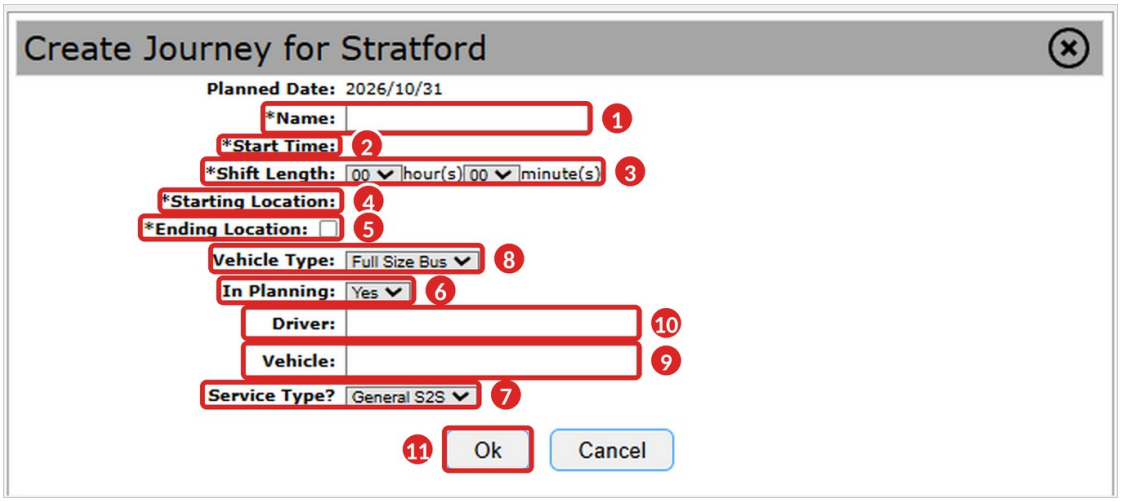


Figure 3: *The Create Journey window*

#	Field	What to do
1	**Name** *required*	Enter a name for the journey.
2	**Start Time** *required*	Set the time the journey starts.
3	**Shift Length** *required*	Select the length of the journey in hours and minutes.
4	**Starting Location** *required*	Select where the journey starts.
5	**Ending Location** *required*	Select where the journey ends. If it ends where it started, just tick the checkbox.
6	**In Planning**	**Yes** – the planner can start assigning trips to the journey straight away. **No** – trips are assigned manually, or the planner is kept from assigning trips.
7	**Service Type**	Defaults to S2S (Stop to Stop). Change it if the journey is D2D (Door to Door), Para Only, etc.
8	**Vehicle Type**	Only vehicle types that can carry out the selected Service Type are listed.
9	**Vehicle**	Start typing the vehicle name and select it from the list. Only vehicles matching the Vehicle Type and Service Type appear.
10	**Driver**	Type the driver's name as lastname firstname and select it from the list.
11	**Ok**	Click Ok to create the journey.

TIP Set the **Service Type** before the Vehicle Type and Vehicle – it controls which vehicle types and vehicles you can choose. If no vehicle appears when you type, check that it matches the selected Service Type and Vehicle Type.

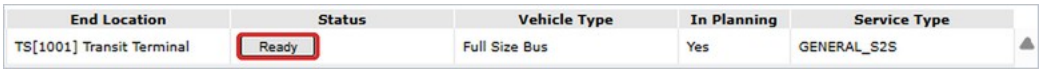
NOTE Only the service types set up for your service area are shown (controlled in Admin settings). If the settings were changed recently and an option is missing, refresh your browser.

Step 4. The new journey appears on the Journeys screen. Click **Ready** under **Status**.



	Name	Start Time	Length	Driver	Vehicle	Start Location
1 ▼	Journey A	06:00	10 h	Allan, Bill	1063	TS[1001] Transit Terminal

Figure 4: *The new journey on the Journeys screen*



End Location	Status	Vehicle Type	In Planning	Service Type
TS[1001] Transit Terminal	Ready	Full Size Bus	Yes	GENERAL_S2S

Figure 5: *Click Ready under Status*

> **IMPORTANT** A journey only receives trips from the planner once it is marked **Ready**. Click Ready as soon as the journey is set up.

2. Edit an existing journey

Dispatch may need to change a journey after it has been created – for example when a driver is unavailable, a vehicle has a problem, or the start time or length of the shift changes.

What you can change depends on whether the journey has already started:

Detail	Option A – Out of Planning	Option B – Reset Readiness + Out of Planning
Name	✓	✓
Length	✓	✓
End Location	✓	✓
Start Time	–	✓
Driver	–	✓
Vehicle	–	✓
Start Location	–	✓
Vehicle Type / Service Type	–	✓

Option A can be used on any journey, including one that is already on the road. **Option B** must be done **before the driver starts the journey**.

Option A – Quick edits (Out of Planning)

Step 1. Select **Journeys** in the left-side menu to see the journeys for the selected day.

Step 2. Click the ▼ arrow next to the journey number, then select **Out of Planning**.

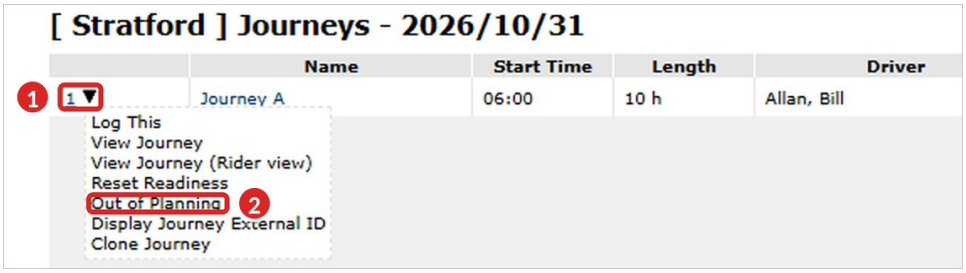


Figure 6: *Open the drop-down arrow (1), then select Out of Planning (2)*

> **NOTE** **Out of Planning:** the planner stops adding or removing trips on this journey. Trips already on it stay exactly where they are until the journey is put back in planning.

Step 3. The journey row turns yellow. Edit the **Name**, **Length** or **End Location** by double-clicking the underlined value.



Figure 7: *Editable details while out of planning: Name (1), Length (2), End Location (3)*

Step 4. When finished, click the ▼ arrow and select **Set in Planning**.

Option B – Full edits (Reset Readiness + Out of Planning)

Step 1. In the **Journeys** screen, click the ▼ arrow next to the journey number and select **Reset Readiness**. Open the menu again and select **Out of Planning**.

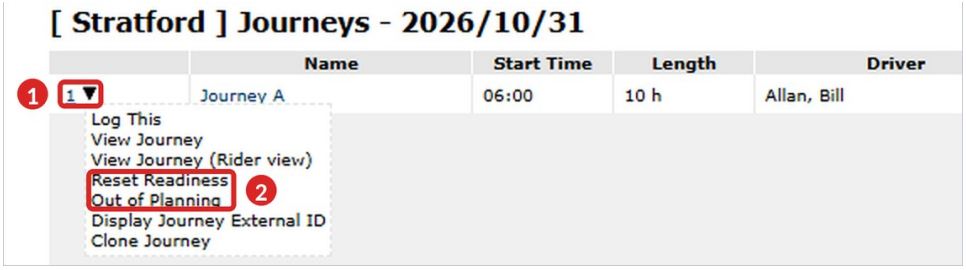


Figure 8: *Select Reset Readiness and Out of Planning (2)*

Step 2. Once the journey is out of planning and not ready, more details become editable. Double-click the underlined value to change it.



Figure 9: *Editable details (1–5)*



Figure 10: *Editable details (6–8) and the Ready button (9)*

#	Field	What to do
1	**Start Time**	Change the time the journey starts.
2	**Length**	Change the length of the shift.
3	**Driver**	Assign a different driver.
4	**Vehicle**	Assign a different vehicle.
5	**Start Location**	Change where the journey starts.
6	**End Location**	Change where the journey ends.
7	**Vehicle Type**	Change the vehicle type.
8	**Service Type**	Change the service type.
9	**Ready**	Click Ready once all changes are made.

Step 3. Click **Ready** under **Status**.

Step 4. Click the ▼ arrow and select **Set in Planning**.

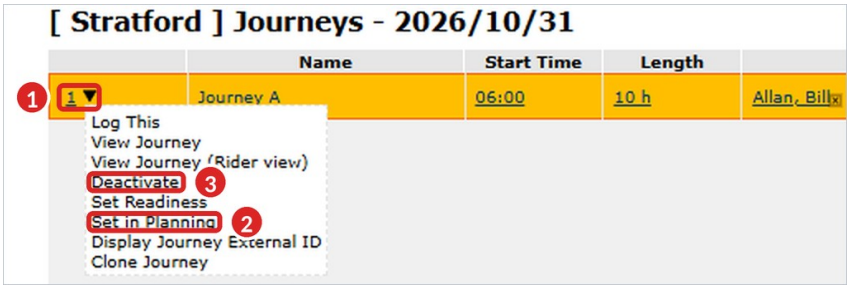


Figure 11: *Open the drop-down (1) and select Set in Planning (2). Deactivate (3) is covered below.*

> **IMPORTANT** Always put the journey back in planning after editing. Until you select **Set in Planning**, the planner will not add or remove trips on this journey.

3. Deactivate a journey

If a journey was created by mistake, use **Deactivate** (3 in the figure above) from the ▼ menu to hide it from the Journeys screen. This option appears once the journey has been reset and taken out of planning.

> **TIP** To see deactivated journeys for the day, tick **Include Inactive** at the top right of the Journeys screen.