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ATHENA ROUTING & PLANNING

Bell Time Trips Training Resource Guide

Bell Time Trips

Training Resource Guide

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BELL TIME TRIPS TRAINING RESOURCE GUIDE

PURPOSE OF THIS GUIDE

The Bell Time Trips Resource Guide will provide you with explanations of the basic tools within Athena, walk you through the procedure of updating stops on runs and assigning students to trips within the software, as well as provide you with specific scenarios you may encounter as you begin to independently navigate the system within the User Stories section of this guide.

ATHENA BELL TIME TRIPS INTRODUCTION

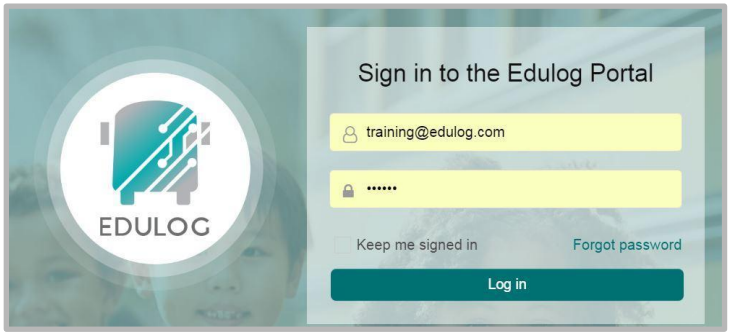
The Bell Time Module allows users to update stops on runs and assign students to a school trip or bell time without having to change modules. Similar to other modules in Athena, it has a “sandbox” nature where the user will be able to work in multiple “tasks” in order to perform multiple jobs concurrently. Allowing for multiple tasks to be open at a time ensures the user does not need to sacrifice a workflow to complete another.

ATHENA STUDENT MAP ASSET KEY

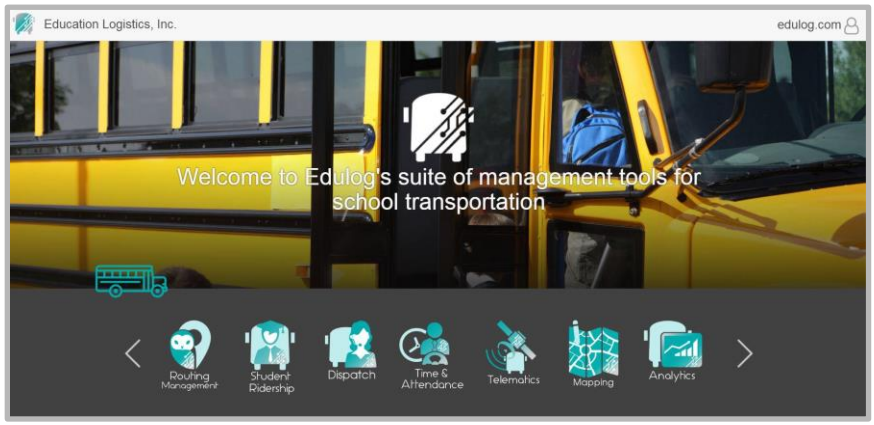
Symbol	Explanation	Symbol	Explanation
	Assign a Trip		Query Stop Locations
	Unassign a Trip		Create New Stop Location
	Turn OFF Preview Window		
	Unassign a Stop		

NAVIGATING THE BELL TIME TRIPS MODULE

1. **Sign In:**
   You will first come to the Sign In page where you will enter your Username (email) and Password.

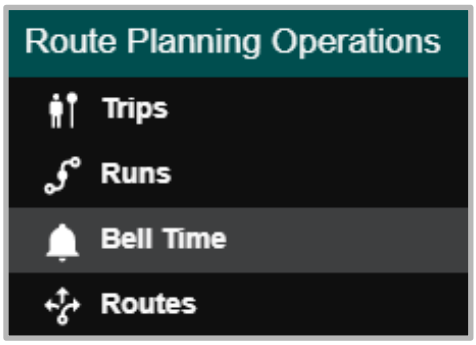


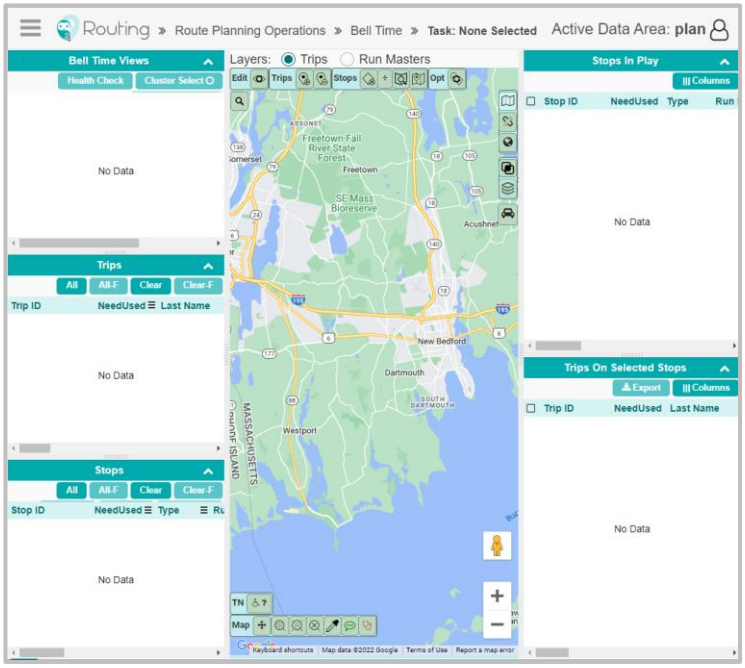
2. **Athena Portal Home Page:**
   You will be brought to the Athena Portal Home Page; at the bottom of this screen are the Athena applications.



3. **Routing Management:**
   Select the owl icon to enter the Routing Management application.

4. **Route Planning Operations:**
   Navigate to “Bell Time” under Route Planning Operations.

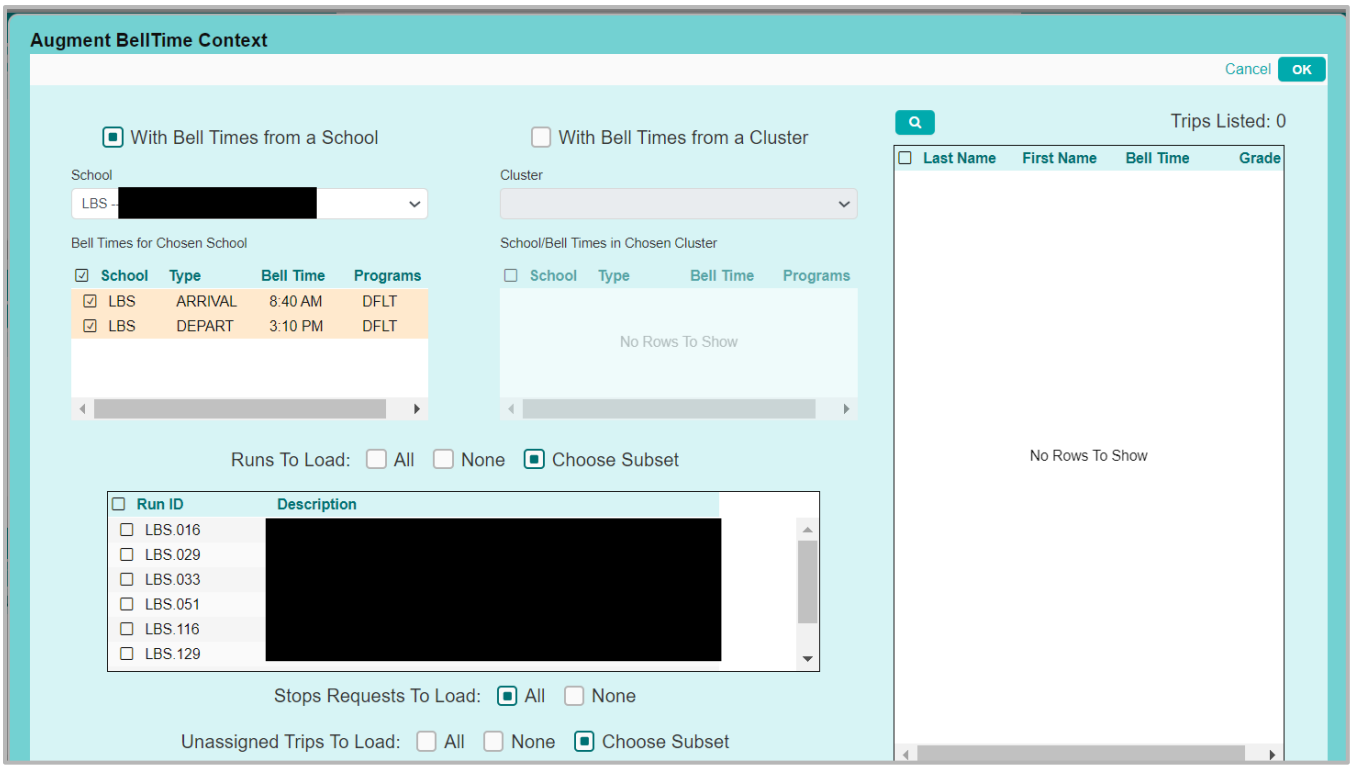




Note: This module will not display any data until a task is created.

5. **Creating a Task:**
   Hover over the "+" sign in the lower left of the module and craft an identifiable name for your task—select Create.
   - If you do not create a task the system will create one for you and record a timestamp.
   - **It is recommended** that the user save the work, and create new tasks every time they enter the Bell Time module.

6. **Augment Context:**
   Upon the creation of a task in Bell Times, the Augment Context window will automatically populate. In this window, choose your school and bell times in either the "School" or "Cluster" drop down, the associated programs will additionally be displayed for the selected Bell Times.



At the bottom of the augment context window the user will see a few different options to further query the data that populates within the opened task:

- **Runs to Load:** Selecting "Choose Subset" will populate a data panel below the filed where the user can choose a smaller 'subset' of the run data to work with based on the identified school/bell time.

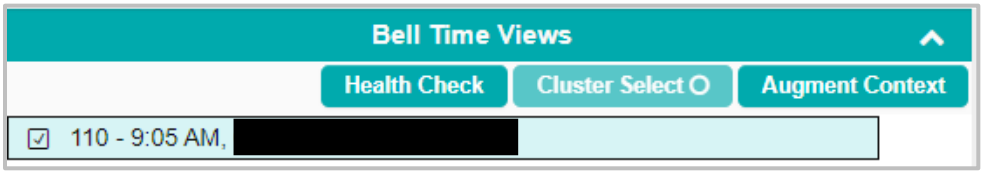
- **Stops Requests to Load:** Choose whether to display all stop requests within the map

panel, or to have none load.

- **Unassigned Trips to Load:** Selecting “Choose Subset” will display all found unassigned trips based on the associated school/bell time in the far-right data panel of the window. Any or all unassigned trips selected in the data panel of the augment context window, will populate at the top of the “Trips” card within the Trips Layer of the Bell Time module.

When you have completed your search augmentation, select “OK” in the top right of the window; the Bell Time information for your school will populate in the Data Panel.

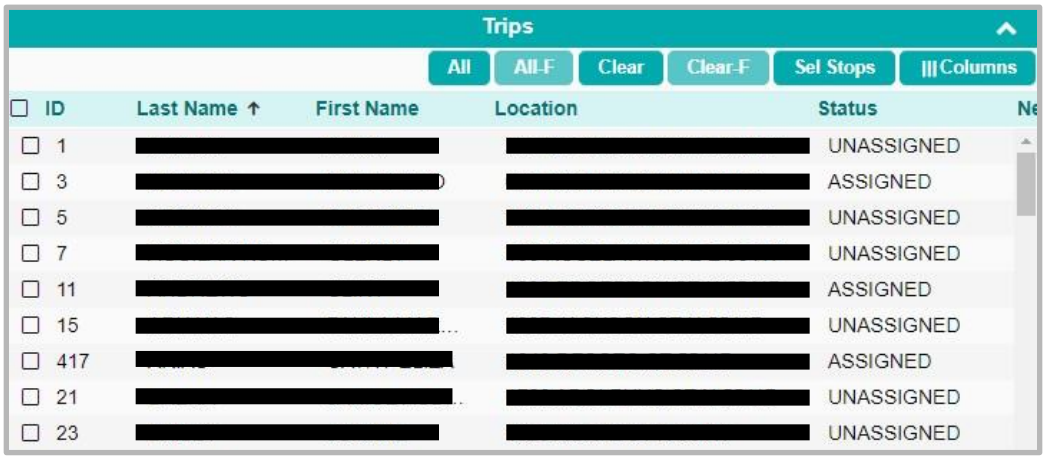
7. **Bell Time View:**
   The school and selected Bell Time will appear in the Data Panel; select the bell time by checking the box to the left. Once selected, all Runs and Stops for that School and Bell Time will load in the Data Panel.



8. **Layers:**
   Above the map panel, you will have the ability to choose which layer you want to work with, or toggle between multiple.

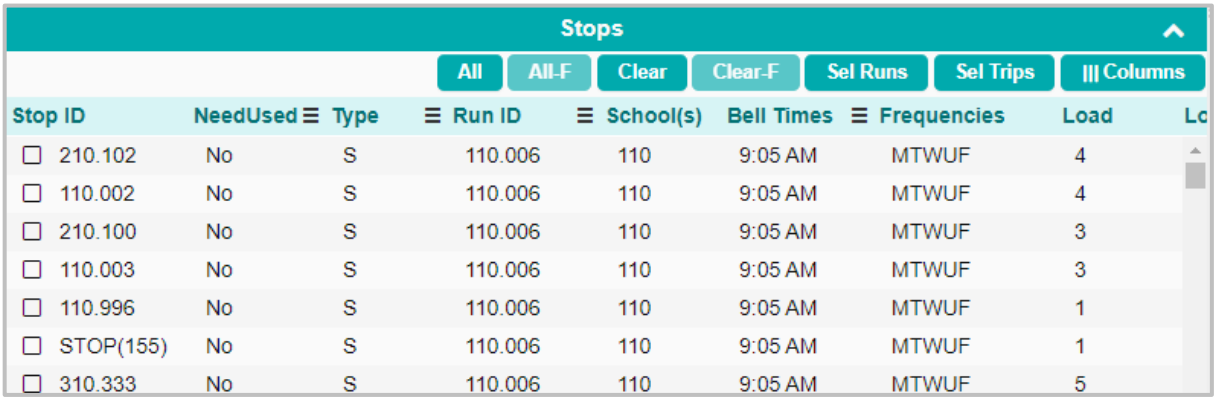
- **Trips:** Student Trips from the Trips Module.
- **Run Masters:** Master Runs from the Runs Module.
- **Run Covers:** Run Frequencies from the Runs Module.

9. **Trips:**
   When selecting the Trips layer, student Trips and Stops will be listed in the Data Panel. Trips will be listed first, which contain: Trip ID, Last Name, First Name, Location, Status, User Defined Fields, and other information that can be arranged with the “Columns” button.



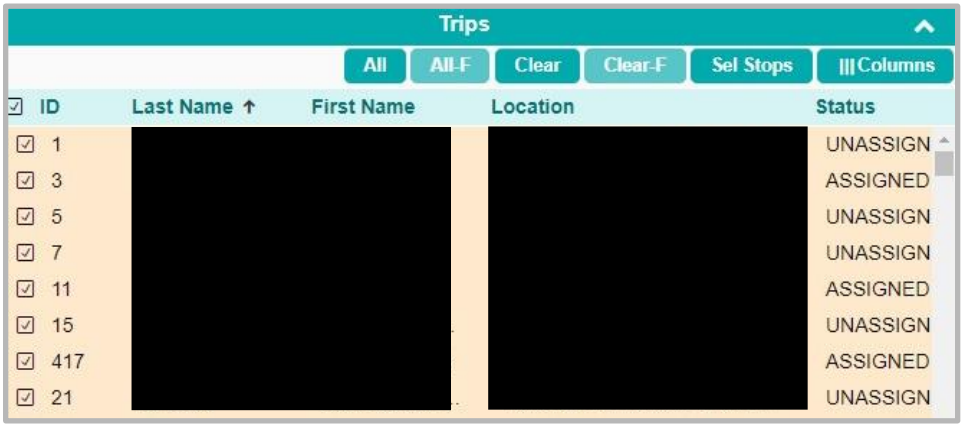
10. Stops:

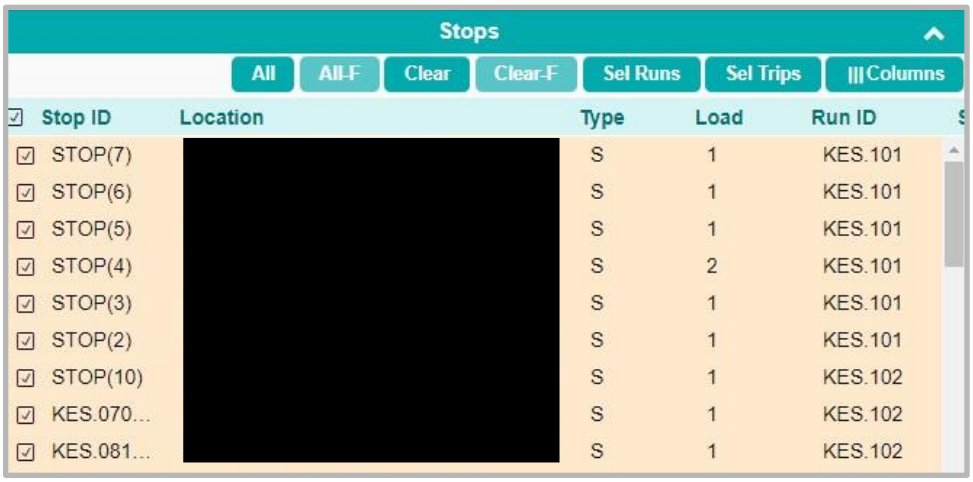
The stops will be listed below the “Trips” card in the Data Panel; the fields listed in the Stops card are: Stop ID, Location, Type, Load, Run ID, and other information that can be arranged with the “Columns” button.



11. Select Trips and Stops in the Data Panel:

To view the trips and stops associated with the Bell Time on the Map Panel, select the “ALL” button within the Data Panel.

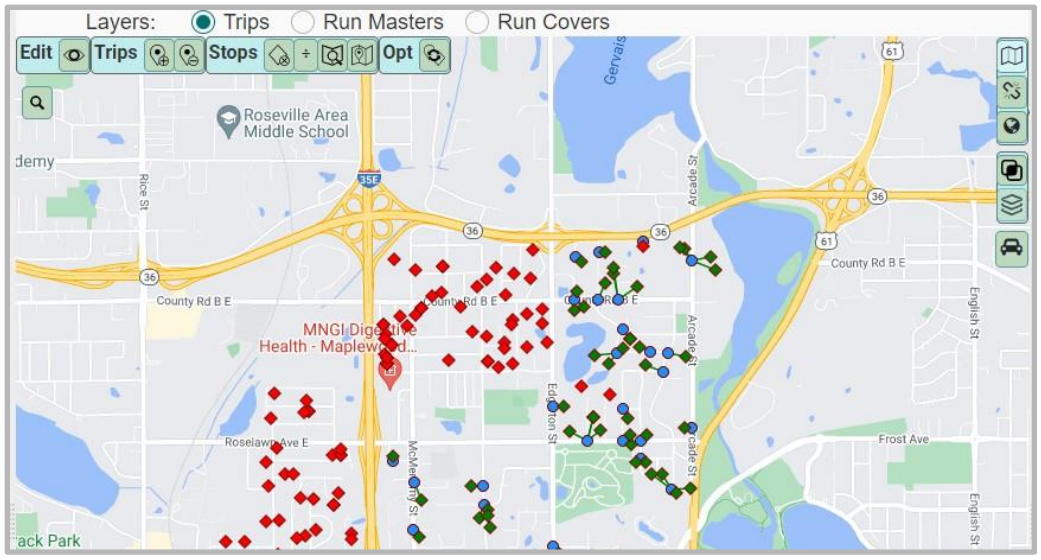




12. Expand and Collapse Cards

- **Up Arrow:** Fully collapse card above.
- **Double Arrow:** Fully collapse card above and below.
- **Down Arrow:** Fully collapse cards below.
- **Double Box:** Reset cards.

13. Map Panel View:



12.1 Trip Colors:

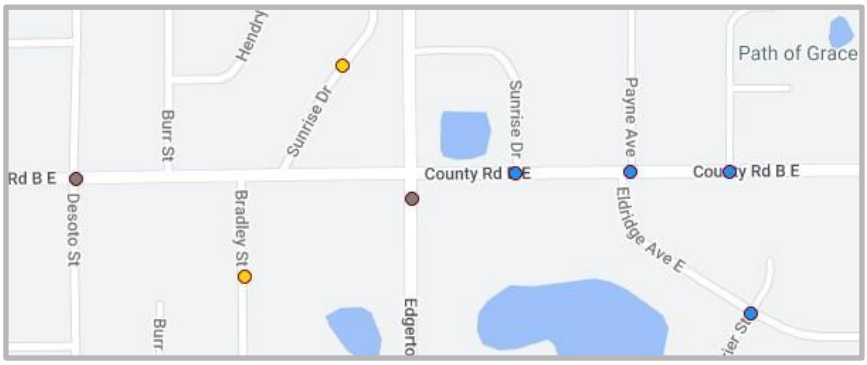
There are three colors that represent trip assignments:

- **Yellow:** Partially assigned (has transportation for some of their trips).
- **Red:** Unassigned (needs transportation to and from school—all trips).
- **Green:** Assigned (all trips are accounted for).

12.2 Stop Colors:

There are three colors that represent trip assignments:

- **Blue:** Active Stop (the stop has been assigned to a run).
- **Yellow:** Stop Request (the stop has a student assigned, but is not assigned to a run).
- **Gray:** Stop Location (has no assignments—these stops need to be queried in order to view them on the map).



14. Workspace Panel:

In the Workspace Panel, stops that have been selected will also display in the “Stops in Play” card.

13.1 Trips on Selected Stops:

When you select a stop in the “Stops in Play” card, all trips associated with that stop will populate in the “Trips on Selected Stops” card.

ATHENA USER STORIES

The User Stories section of this guide will offer you scenarios that are applicable to some of the workflows you might encounter in your day-to-day tasks within Athena. Some scenarios that will be discussed include:

- Mirror AM & PM Stop Assignments Using the Auto Assign Tool

- Assign a Trip
- Reset Stop
- Query Stop Location
- Query for Unassigned Trips Using the Polygon Map Tool
- Mirror AM & PM Stop Assignments Using the Auto Assign Tool

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1. Assign a Trip

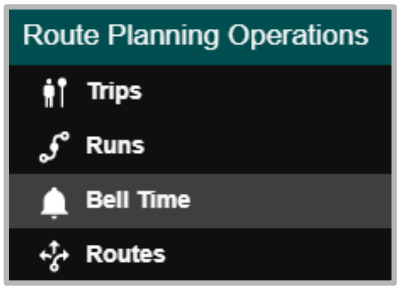
It is the beginning of the school year, and you were tasked to make sure all students for Kennedy Elementary have transportation assignments by assigning them transportation in Bell Time Trips.

Here's How:

1. **Routing Management:**

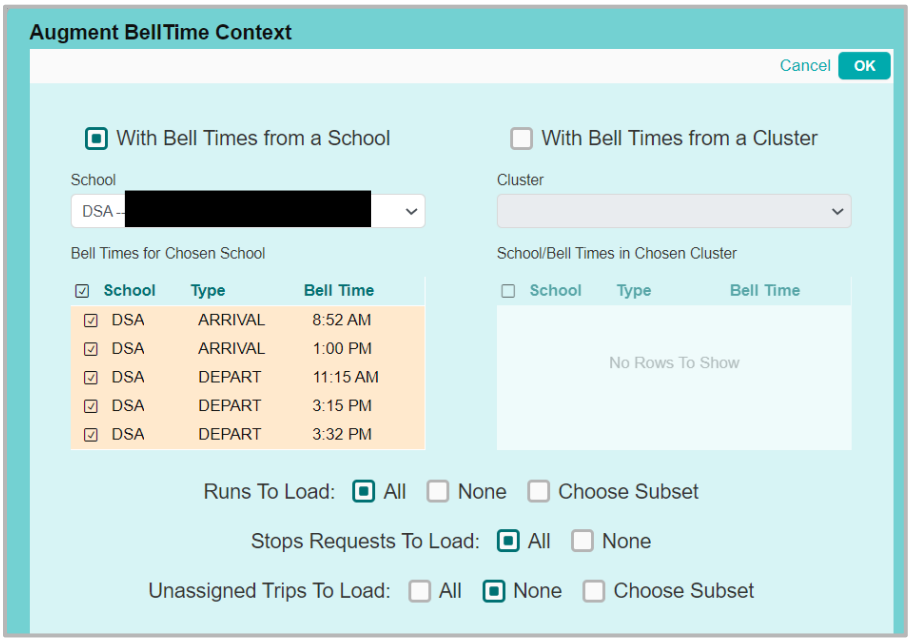
Once logged in, click on the owl icon to enter the Routing Management module.

2. **Route Planning Operations:**
   Under Route Planning Operations select Bell Times—this module will not display until a task is created.



3. **Create Task:**
   Hover over the “+” sign in the lower left of the module and craft an identifiable name for your task—select Create.

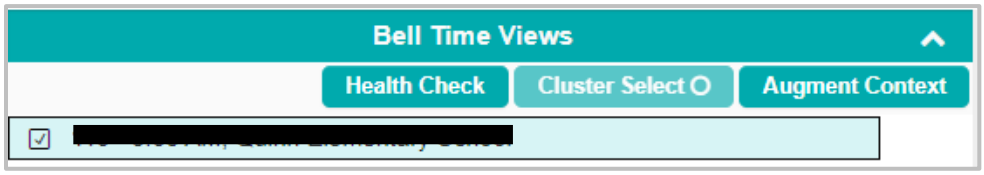
4. **Augment Context:**
   The Augment Context window will automatically populate following the creation of a task. In this window, choose your School and Bell Times in either the School or Cluster drop down.



When you have completed your search augmentation, select “OK” in the top right of the window;

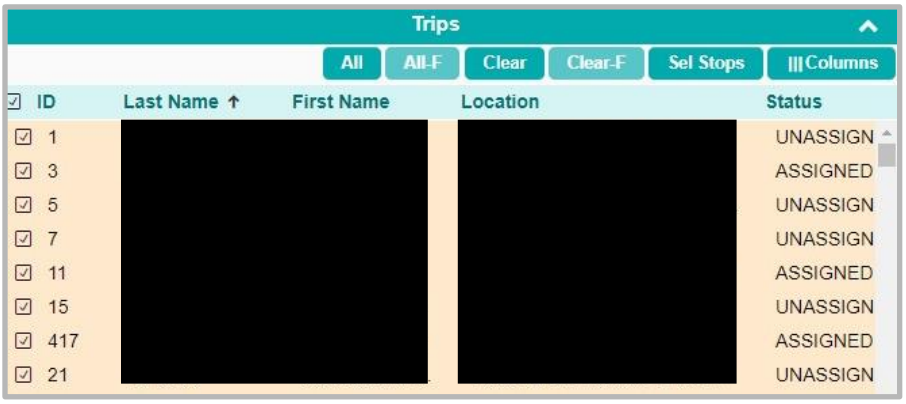
the Bell Time information for your school will populate in the Data Panel.

5. **Bell Time Views:**
   The school and selected Bell Time will appear in the Data Panel; select the bell time by checking the box to the left. Once selected, all Runs and Stops for that School and Bell Time will load in the Data Panel.

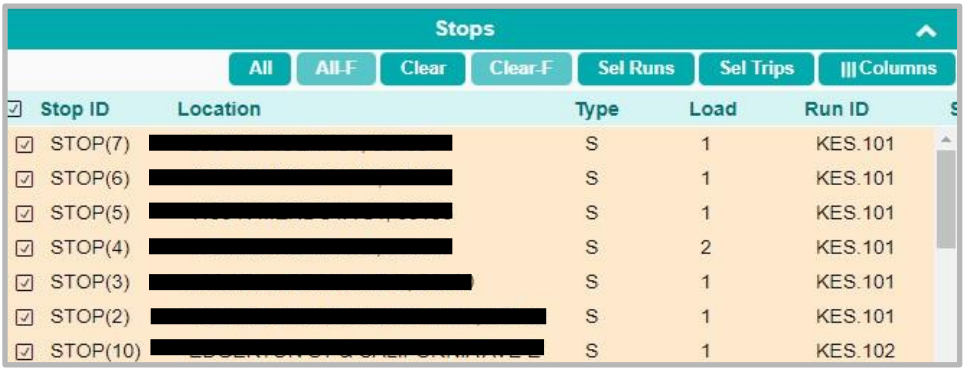


6. **Layers:**
   Above the map panel, select Trips.

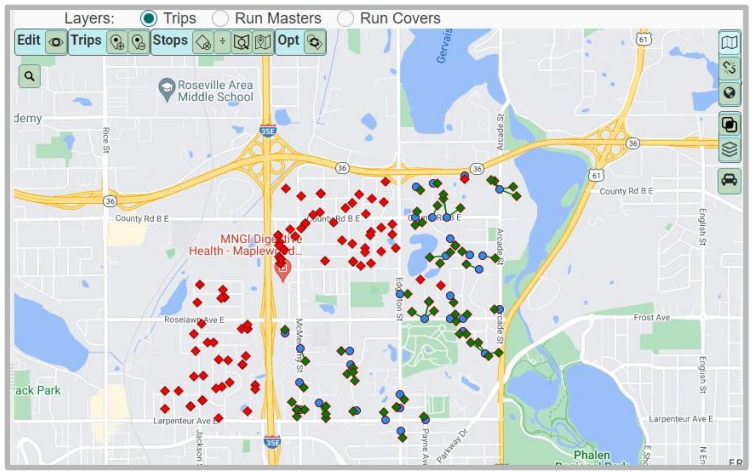
7. **Trips and Active Stops:**
   a.) **Trips:**
   To view the trips associated with the Bell Time, select the “ALL” button within the Data Panel.



   b.) **Active Stops:**
   To view the stops associated with the Bell Time, select the “ALL” button within the Data Panel.

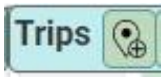


All Trips and Stops will display on the Map Panel.

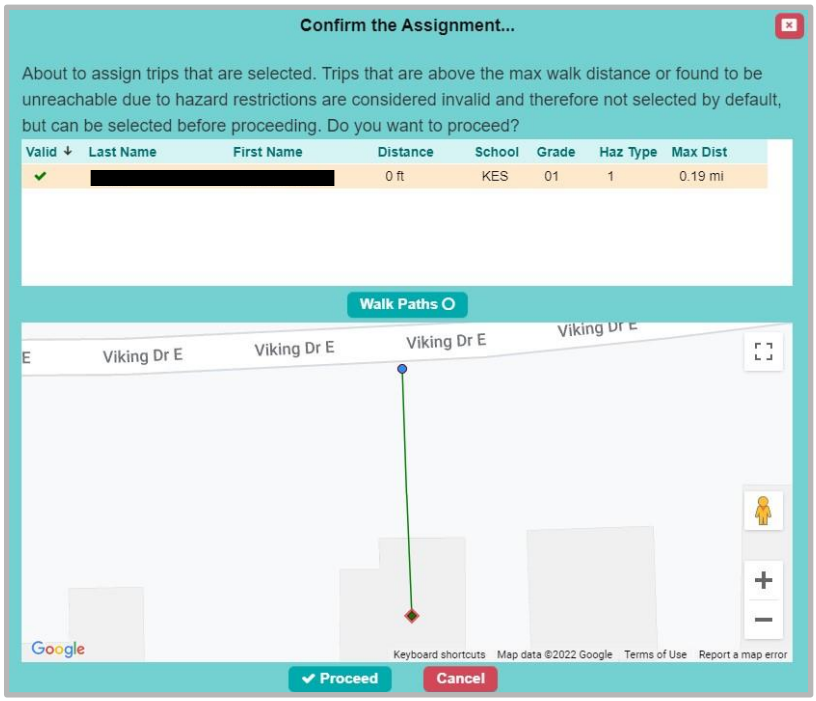


8. Assign Trips:

Zoom to the trip you want to assign; select the unassigned trip and the stop service on the map—both will highlight in red. Navigate to the map tools and select the “Assign Trip” tool.



A confirmation window will pop up on your screen following your selection of the “Assign Trip”; if there is a green check mark in the Valid column, it indicates the assignment is within the walk distance—select “Proceed” to save.



Once fully assigned, the student trip will turn green.

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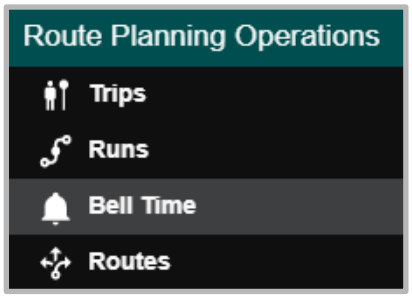
2. Reset Stop

You are a router that has been notified that a current stop location has been found to be unsafe, so you want to remove all trips assigned to the stop.

Here's How:

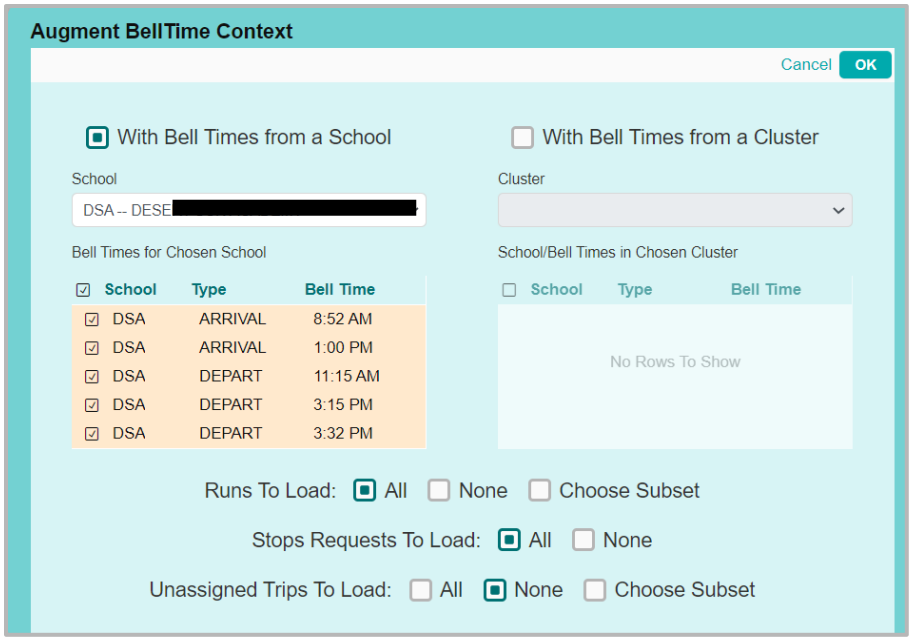
1. **Routing Management:**
   Once logged in, click on the owl icon to enter the Routing Management module.

2. **Route Planning Operations:**
   Under Route Planning Operations select Bell Times—this module will not display until a task is created.



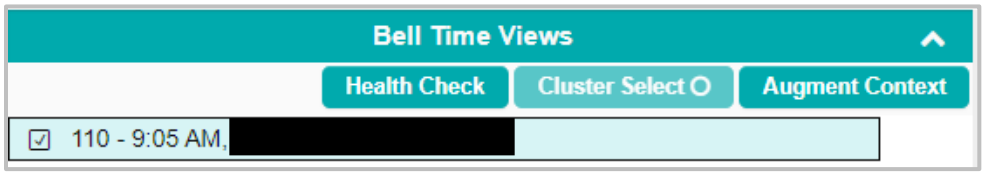
3. **Create Task:**
   Hover over the "+" sign in the lower left of the module and craft an identifiable name for your task—select Create.
   - If you do not create a task the system will cerate one for you and record a timestamp.

4. **Augment Context:**
   The Augment Context window will automatically populate following the creation of a task. In this window, choose your School and Bell Times in either the School or Cluster drop down.



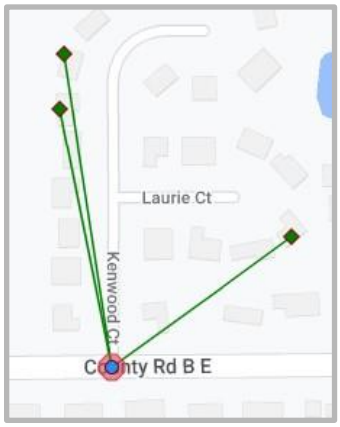
When you have completed your search augmentation, select “OK” in the top right of the window; the Bell Time information for your school will populate in the Data Panel.

5. **Bell Time Views:**
   The school and selected Bell Time will appear in the Data Panel; select the bell time by checking the box to the left. Once selected, all Runs and Stops for that School and Bell Time will load in the Data Panel.



6. **Layers:**
   Above the map panel, select Trips.

7. **Select Stop:**
   In the Data Panel, or on the map, select the stop you want to reset.



7.1 Reset Stop:

Navigate to the tool bar at the top of the Map Panel, select the “Reset Stop” tool—the student trips will be unassigned.

---

3. Query Stop Location

You are trying to assign a student to a stop but there are no active stops that are available in the area. You need to view the approves stop locations by utilizing the “Query Stop Locations” feature to display Inactive stop locations.

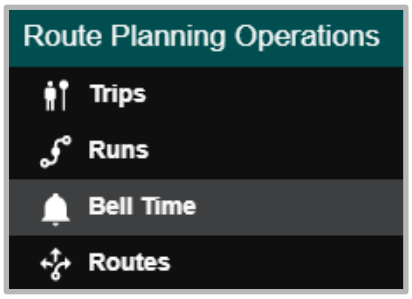
Here’s How:

1. **Routing Management:**

Once logged in, click on the owl icon to enter the Routing Management module.

2. **Route Planning Operations:**

Under Route Planning Operations select Bell Times—this module will not display until a task is created.



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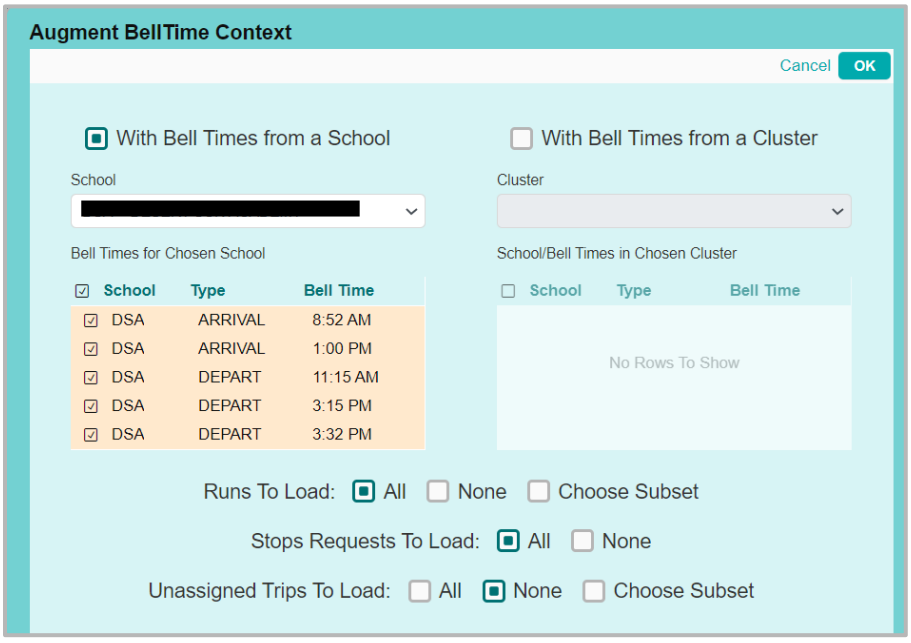

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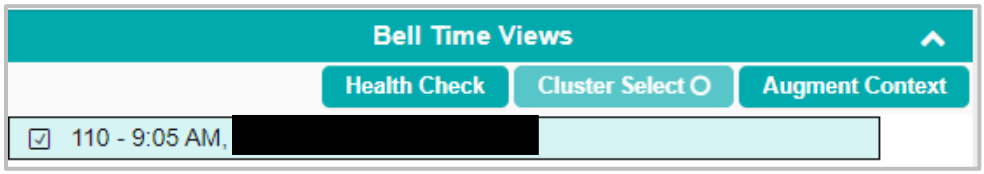


6. Layers:

Above the map panel, select Trips.

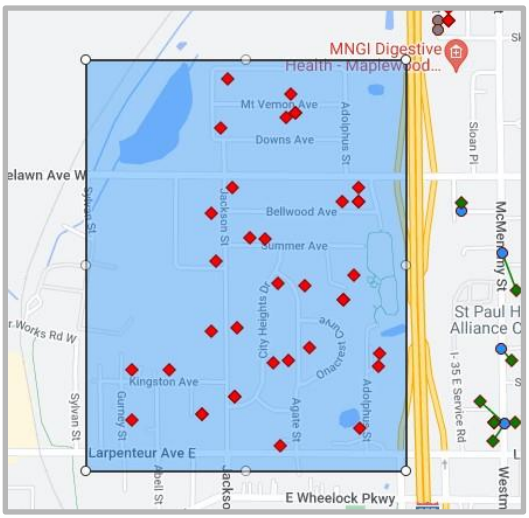
7. Query Stop Location Tool:

In the upper left corner of the Map Panel is the tool bar, select the Query Stop Location tool; once selected another tool bar will open displaying different shape options.

7.1 Drawing a Search Radius:

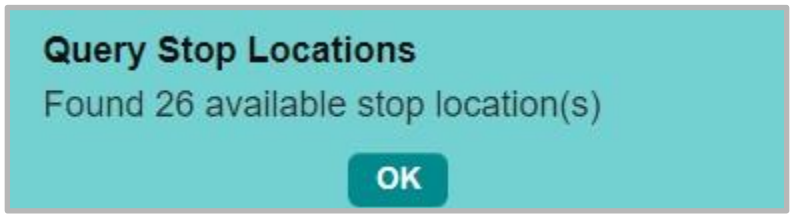
You can select between three different shapes to draw the radius of your search: circle, rectangle, and polygon. Select the shape that will best work for your search.

Utilizing the rectangle tool, to draw the radius, left click at the top of the area you want to search, hold the click and draw; let go of the click when you have finished drawing.

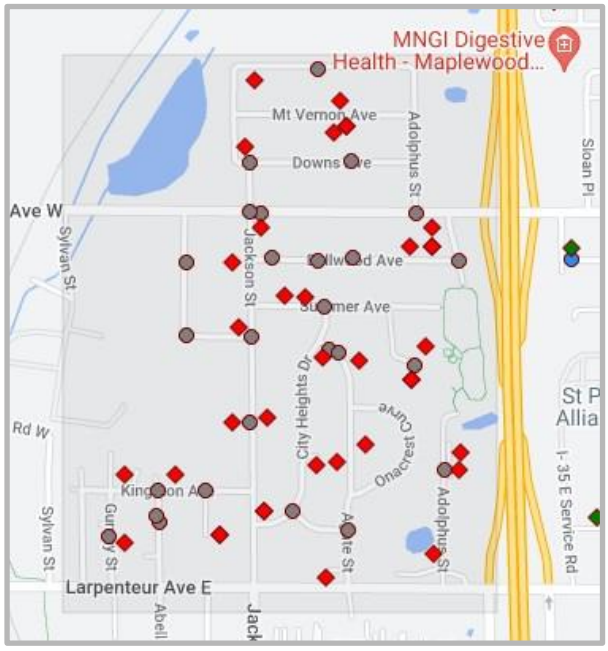


Navigate back to the map tool bar, and select the check mark to confirm your stop query radius.

A Query Stop Locations window will open with the total avaiable stop locations in your search radius.

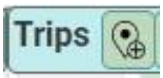


Select “OK” to confirm the search—this will load all the Stop Locations in that area on the map as Grey data points.

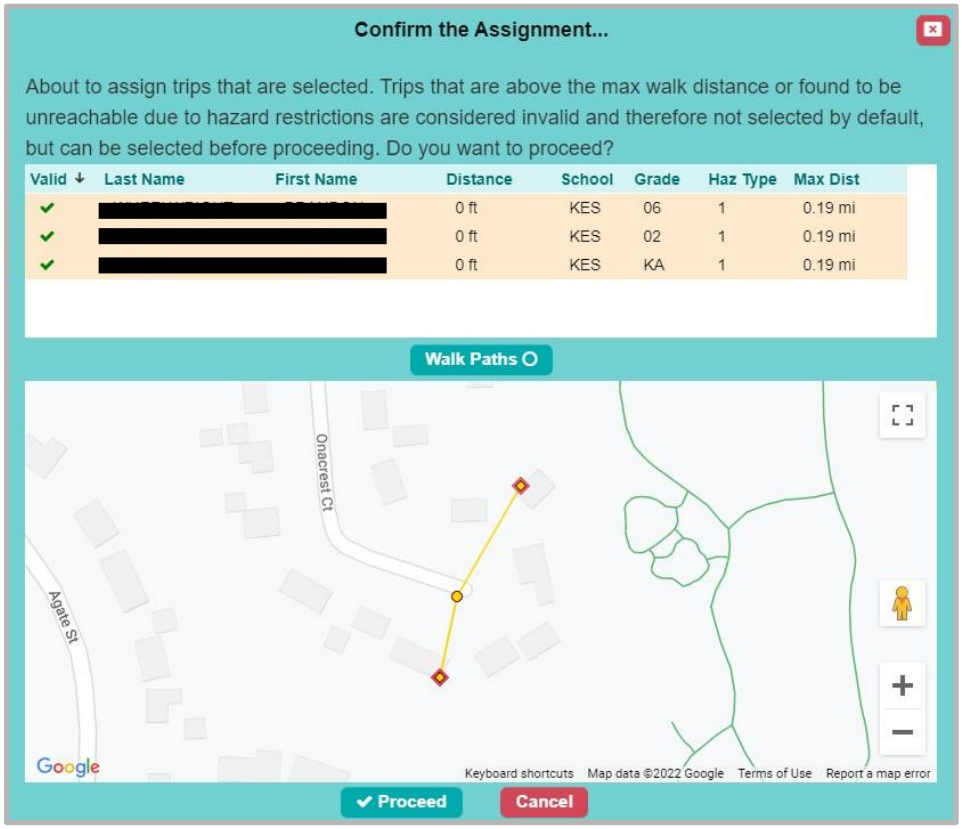


Before you can begin assigning trips to stops, you will first need to remove the rectangle. Select the hand tool in the map tool bar, then select the rectangle on the map. Once you have selected the rectangle on the map, select the trash can in the map tool bar. This will delete the shape, however will leave the results of your query.

8. **Assign Trips to a Stop Location:**
   Select the stop location and the trip(s) you will be assigning to it; select the “Assign Trips Tool” once they are selected.



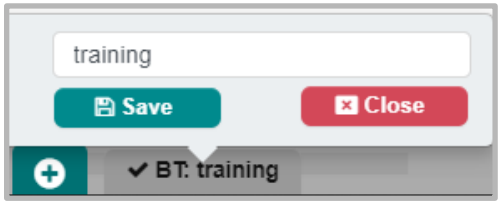
After selecting the “Assign Trips Tool” a window till pop up confirming the trip(s) assignment—select Proceed.

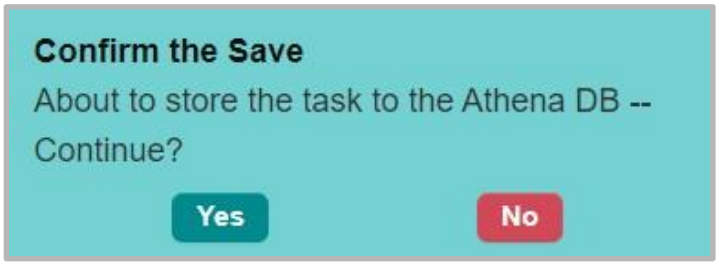


The student trips and the stop will turn yellow following the confirmation of the trip assignment, and will remain yellow until the stop request is assigned to a run.

9. Save:

Navigate to the lower left corner of your screen and hover over the task until a window appears. Click on the “Save” button; if you do not want to save the task, select “Close”.





A confirmation window will appear; select yes to store the task in the database.

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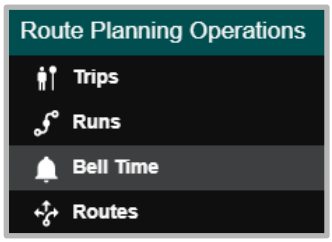
4. Query for Unassigned Trips Using the Polygon Map Tool

You have been tasked to work on assigning all unassigned trips for the 8:52 AM Bell Time, however you do not see any unassigned trips populated in the Trips card. You use the “Query Unassigned Trips” tool to search a larger area on the map to check for unassigned trips.

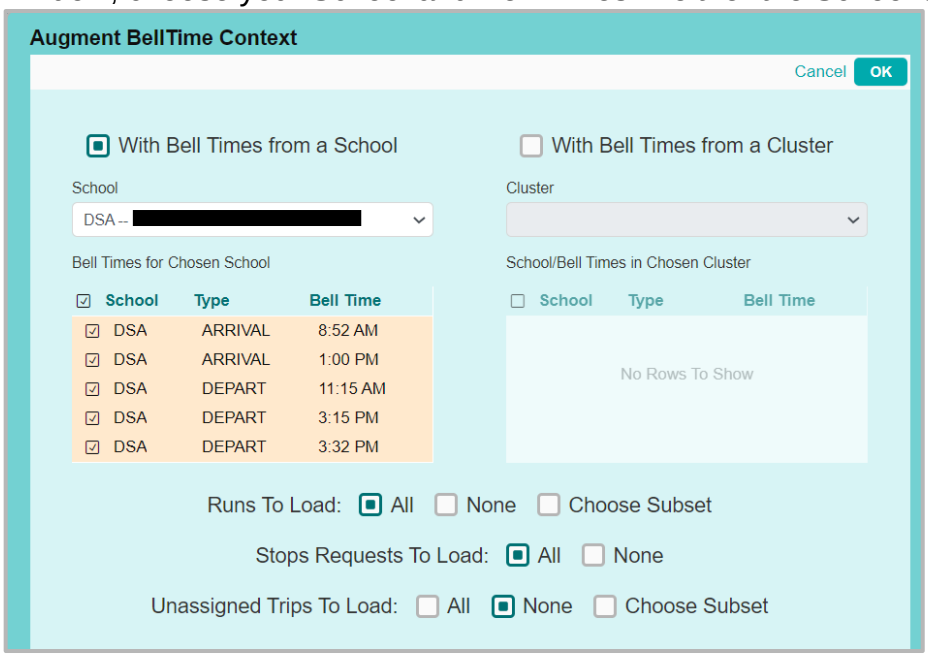
1. **Routing Management:**
   Once logged in, click on the owl icon to enter the Routing Management module.

2. **Route Planning Operations:**
   Under Route Planning Operations select Bell Times—this module will not display until a task is created.



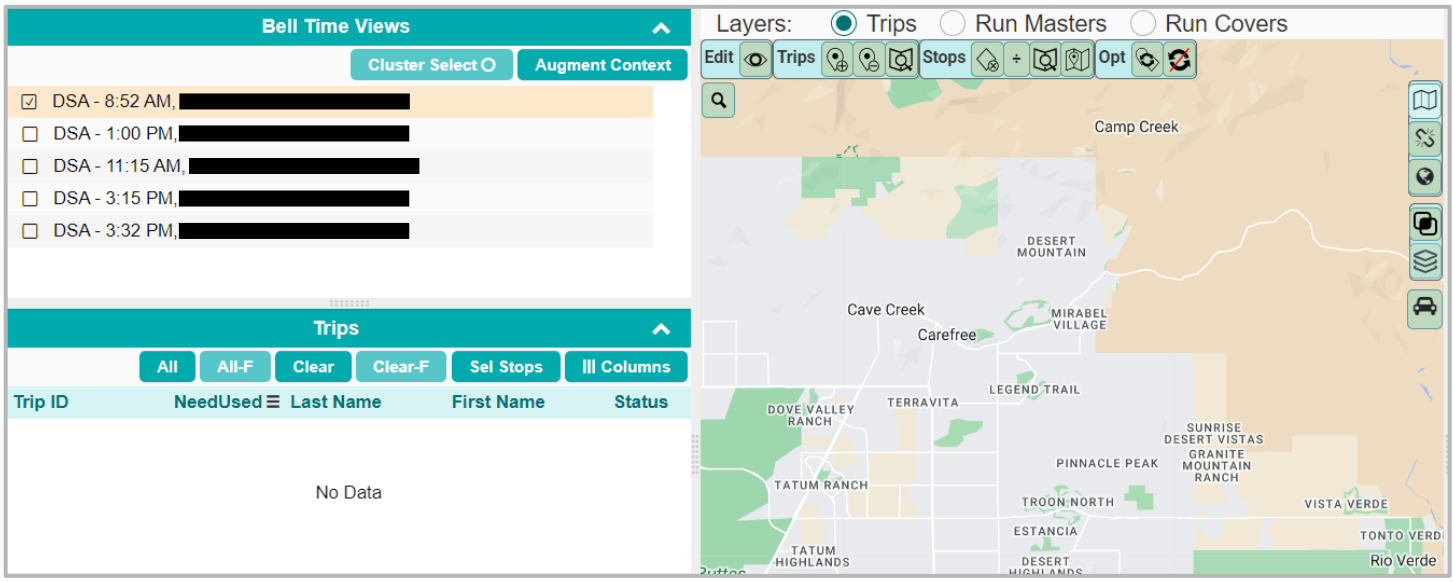
3. **Create Task:**
   Hover over the “+” sign in the lower left of the module and craft an identifiable name for your task—select Create.

4. **Augment Context:**
   The Augment Context window will automatically populate following the creation of a task. In this window, choose your School and Bell Times in either the School or Cluster drop down.



When you have completed your search augmentation, select “OK” in the top right of the window; the Bell Time information for your school will populate in the Data Panel.

5. The selected school and bell times will populate in the “Bell Time Views” card; select the 8:52 AM bell time in the card.



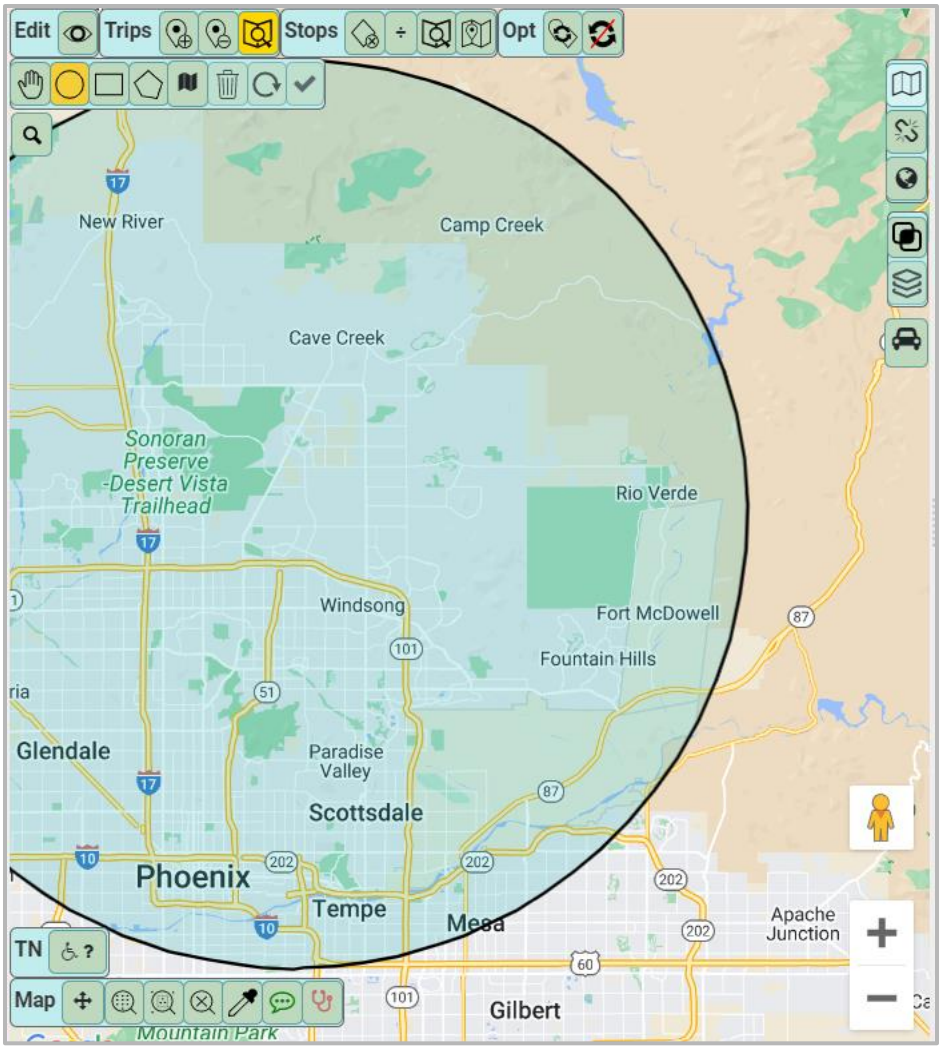
5.1 Query for Unassigned Trips Using Polygon Tool:

To query for unassigned trips, navigate to the map toolbar located in the top left corner of the Map Panel.

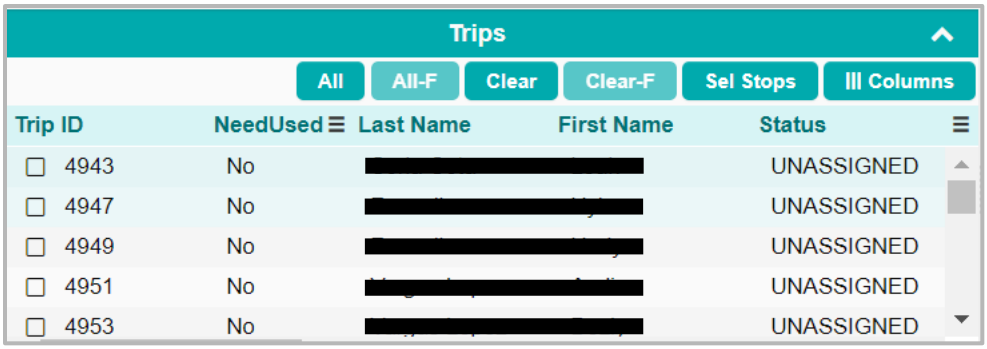
Select the “Query Unassigned Trips” tool within the “Trips” section of the toolbar.

- Once selected, a drop-down menu will be displayed where you are able to select the type of polygon shape to be used when querying within a specific geographic area.

Using the polygon tool, draw a perimeter around the area you would like to search for unassigned trips. Once finished, select the check mark in the map toolbar to begin the search.



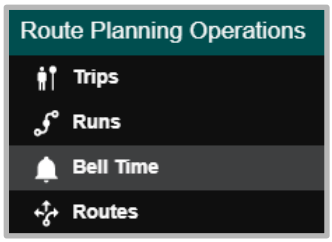
Any unassigned trips found within the drawn perimeter, will populate at the top of the "Trips" card within the Data Panel, and their status will be listed as "Unassigned".



5. Mirror AM & PM Stop Assignments Using the Auto Assign Tool

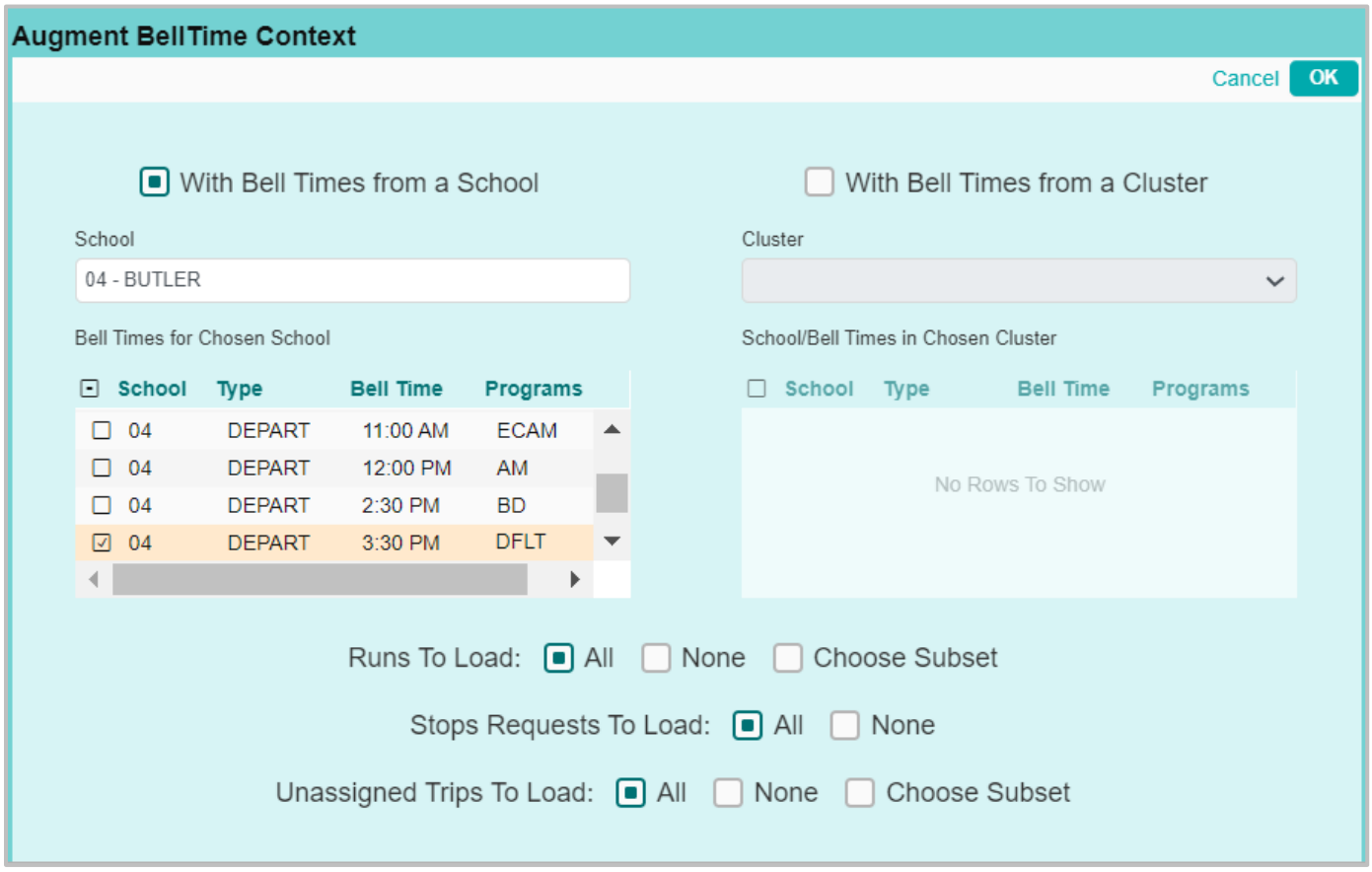
A mirrored trip assignment will assign the student trip to the same stop for both the AM and PM trip. Your transportation manager has tasked you with mirroring the stop assignments for all students within the default bell times for Butler Elementary School. You will navigate to the Bell Time Trips layer, and user the "Auto Assign" tool to complete this task.

1. **Route Planning Operations:**
   Under Route Planning Operations select Bell Times—this module will not display until a task is created.

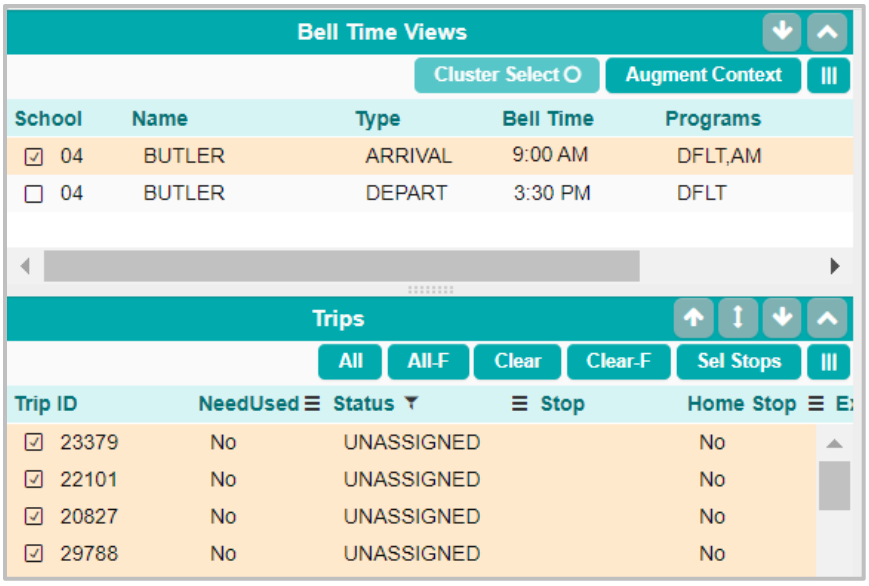


2. **Create Task:**
   Hover over the "+" sign in the lower left of the module and craft an identifiable name for your task—select Create.

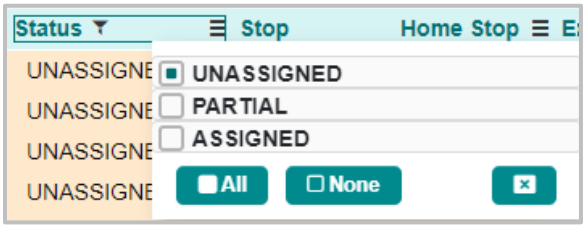
3. **Augment Context:**
   The Augment Context window will automatically populate following the creation of a task; be sure to enable "All" for "Unassigned Trips to Load".



4. **Select AM Bell Time and Query for Unassigned Trips:**
Clients will then select the AM Bell Time in the “Bell Time Views” card, and within the “Trips” card, Query for ‘UNASSIGNED’ Trips within the “Status” column.

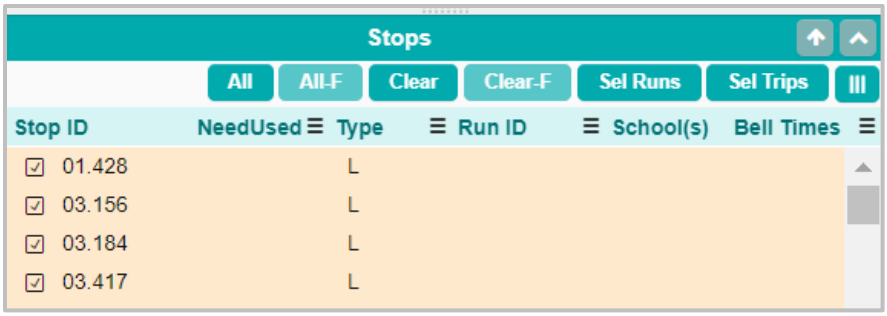


4.1 To query for ‘UNASSIGNED’ trips, the user will select the hamburger icon to the right of the “Status” column header, and toggle off ‘ASSIGNED’ and ‘PARTIAL’.

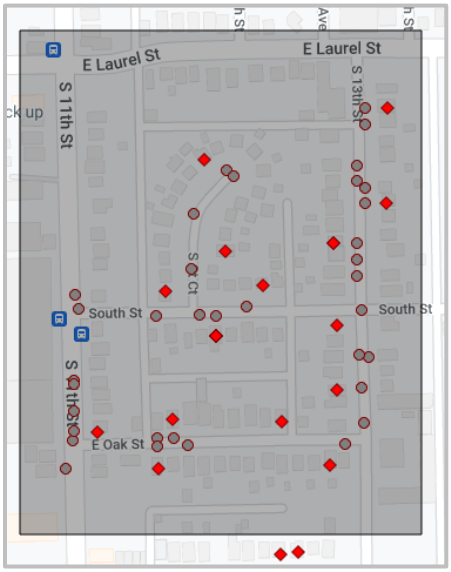


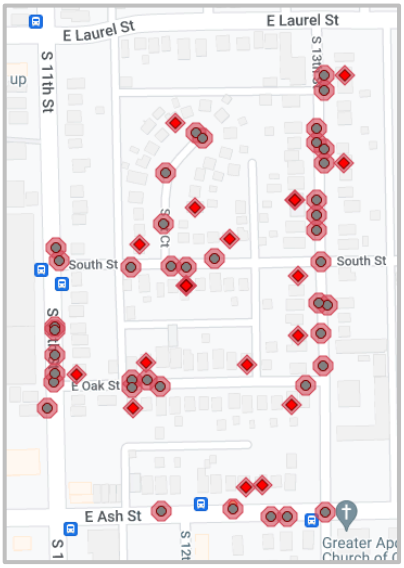
4.2 Select the “All-F” button within the “Trips” card, to view all unassigned trips graphically on the map.

5. **Select Stops:**
Within the Stop Card the user will select “All Stops”, or search for stop locations around the trips they would like the user for the mirrored assignments.
   - Please reference the “Query Stop Location” user story if you need a refresher.



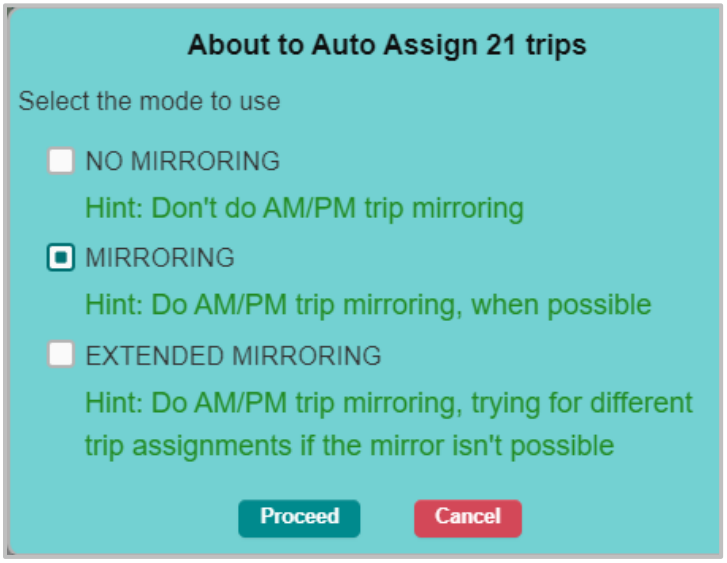
6. **Select Trips in the Map Panel:**
   Using the shift key on your keyboard, the user will hold shift, left click on their mouse, and drag a box around all Trip and Stops the user would like the system to use when building a mirrored stop assignment.





7. **Auto Assign Tool:**
   Once selected, the user will navigate to the “Opt” section of the Map Toolbar, and select the “Auto Assign” tool.

   Once selected, the user will see three options to choose from when building their mirrored assignments.



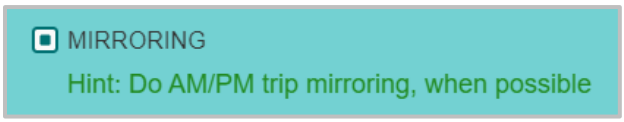
- **No Mirroring**

- **Mirroring:** This option will attempt to mirror the AM/PM trip assignments. If one of the two trips is already assigned, the system will attempt to mirror the assignment using the already assigned stop. If the other trip cannot be mirrored using that stop, it will fail.

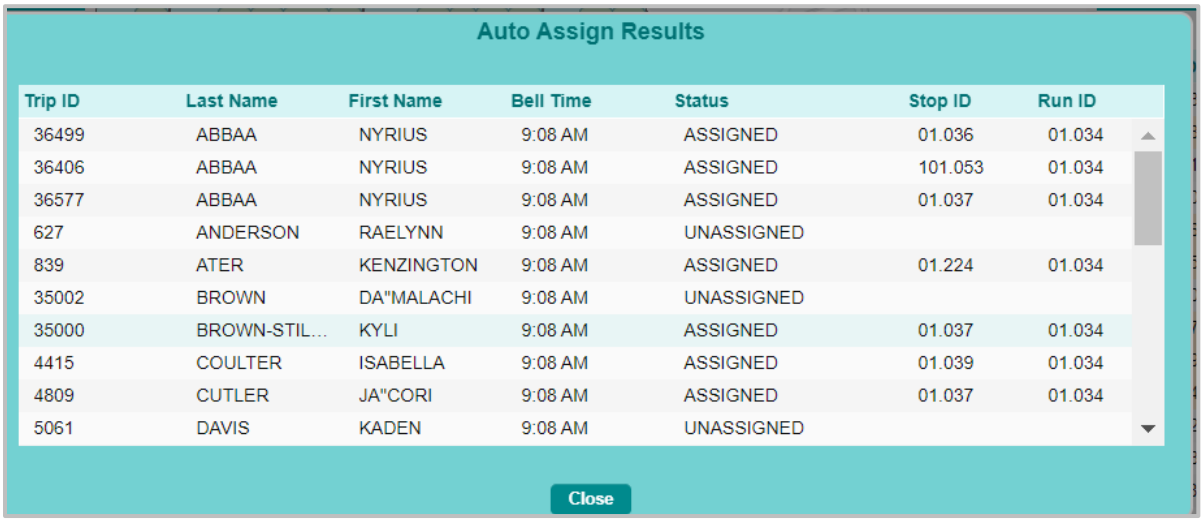
- **Extended Mirroring:** This option will allow the system to unassign a trip assignment if a mirror cannot be made. For example, if the AM trip assignment is assigned and the PM is not, however when trying to mirror the assignment it fails, the system will therefore unassign the AM trip, and attempt to find an alternative valid mirror trip assignment.
    - **This option should be used as a secondary resource to the "Mirroring" default option.**

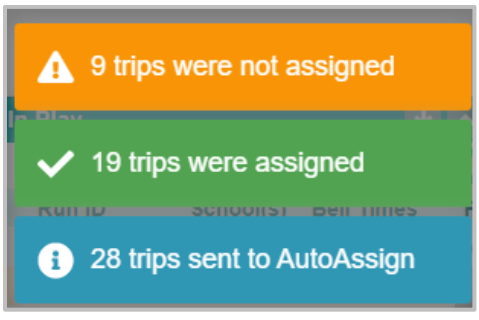
7.1 Select Mirroring:

Within the "Auto Assign" window, the user will enable "Mirroring" and select proceed.



The user will see the following "Auto Assign Results" page, and will be notified of the number of successful assignments, as well as the number of trips that were unable to be mirrored and therefore not assigned.





8. The user will see the successful mirrored assignments as green squares on the map, as well as be able to see their assigned stop.