

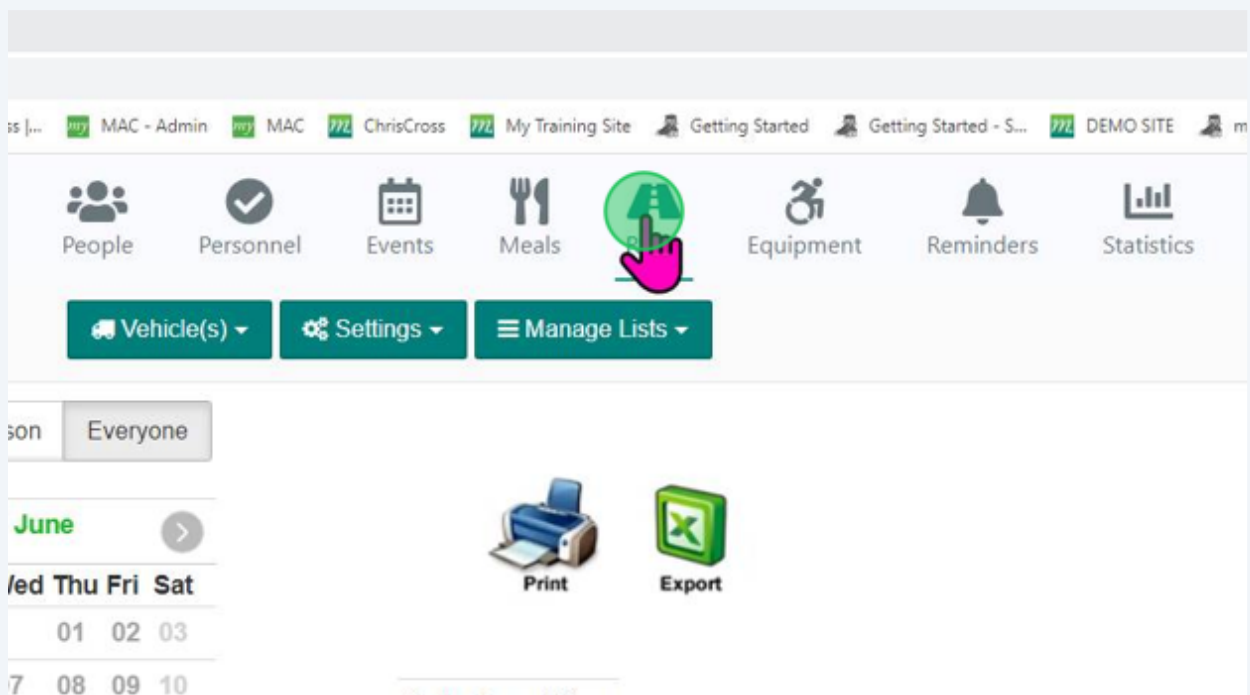
Training 04 - Rides

The rides tab allows centers to schedule rides for people so that you can print out daily ride sheets for drivers. Each driver gets their own sheet and rides are sorted by time.

Setting Up The Rides Tab

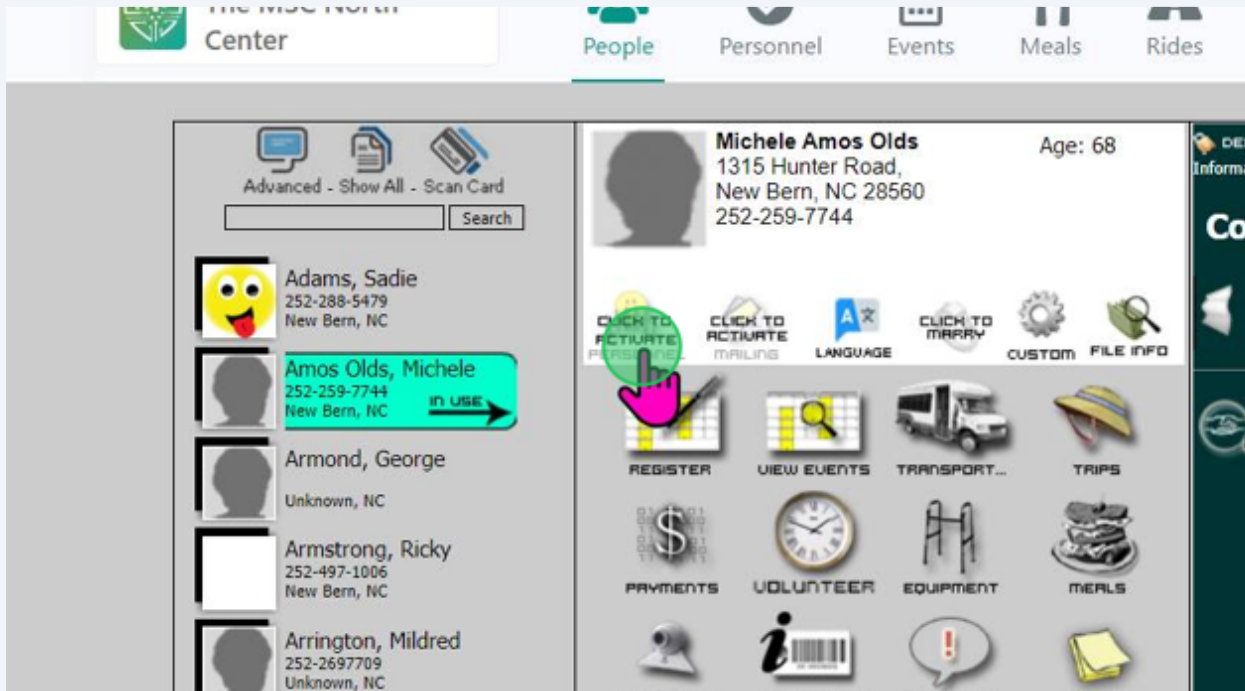
1

Almost everything you need to do to get the Rides tab ready can be done right from the rides tab but the one thing that needs to be done from the people tab is setting up any drivers.



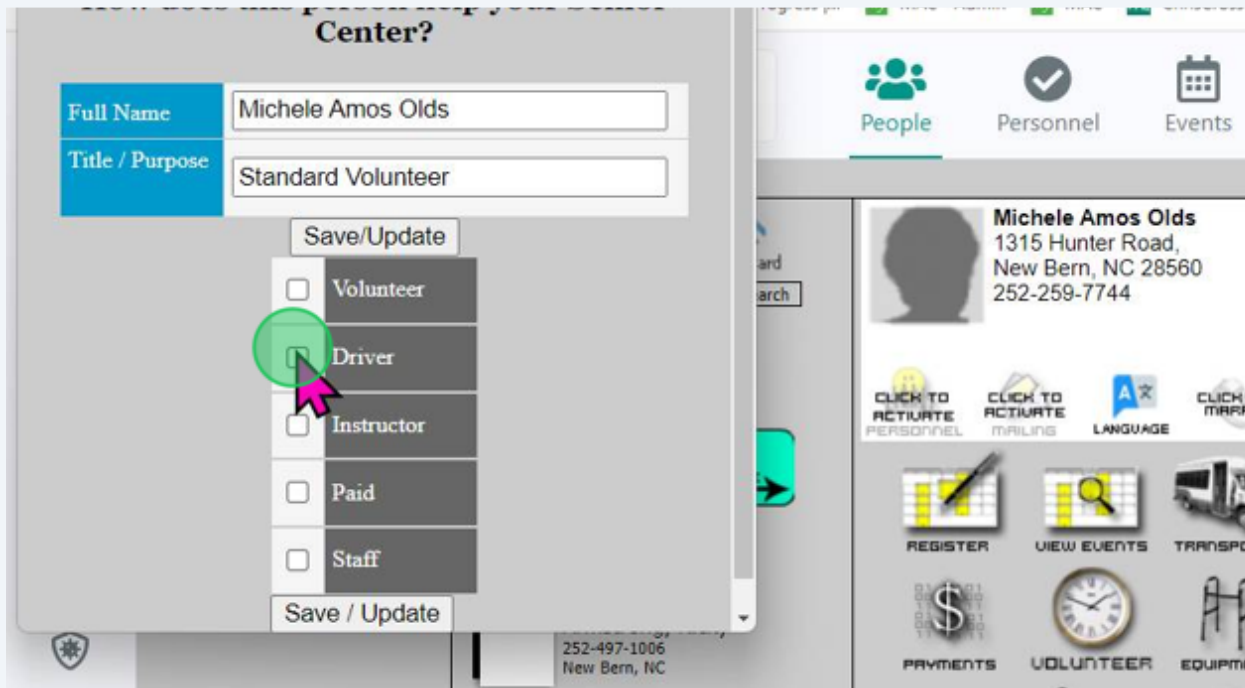
2

To set up a driver, go to the People Tab, select a person and click their "Click to Activate Personnel" icon.

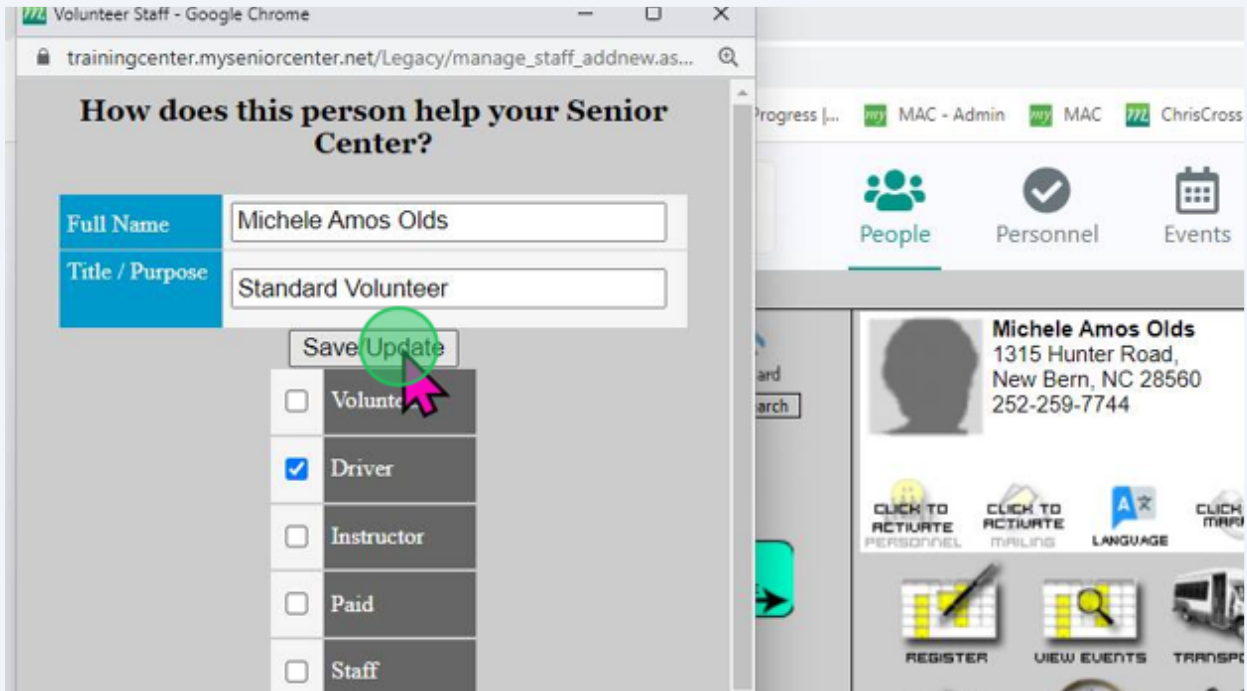


3

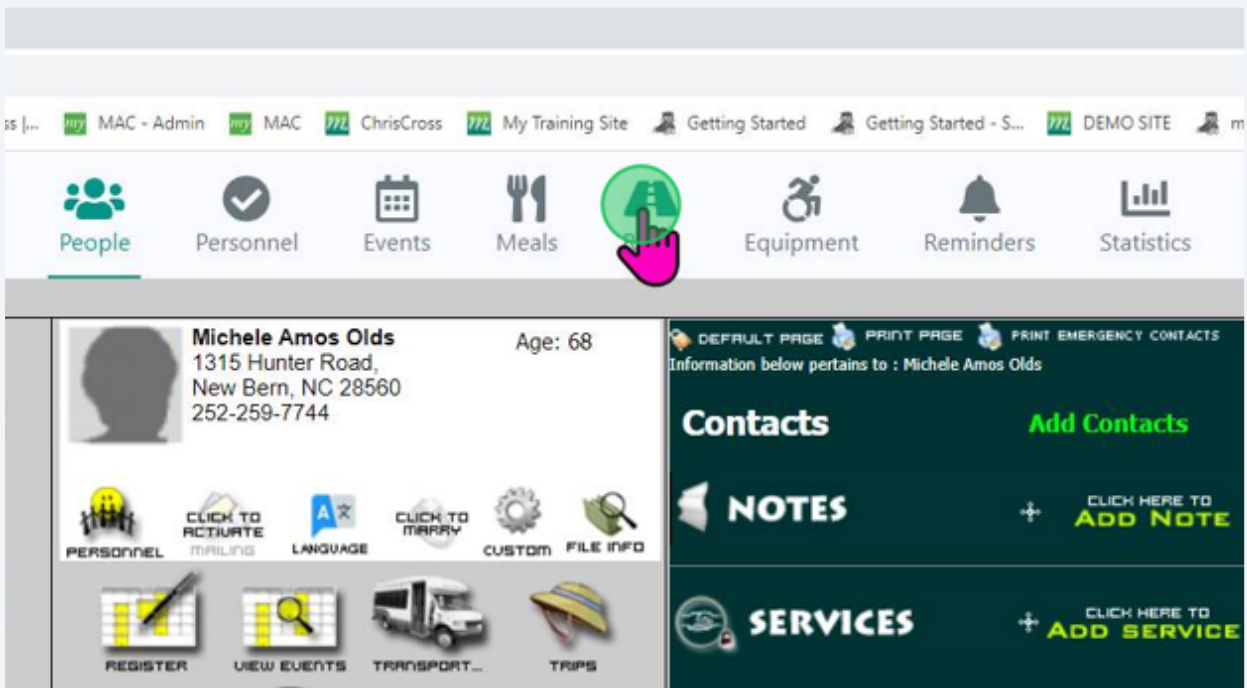
Checking Driver adds this person to your list if drivers.



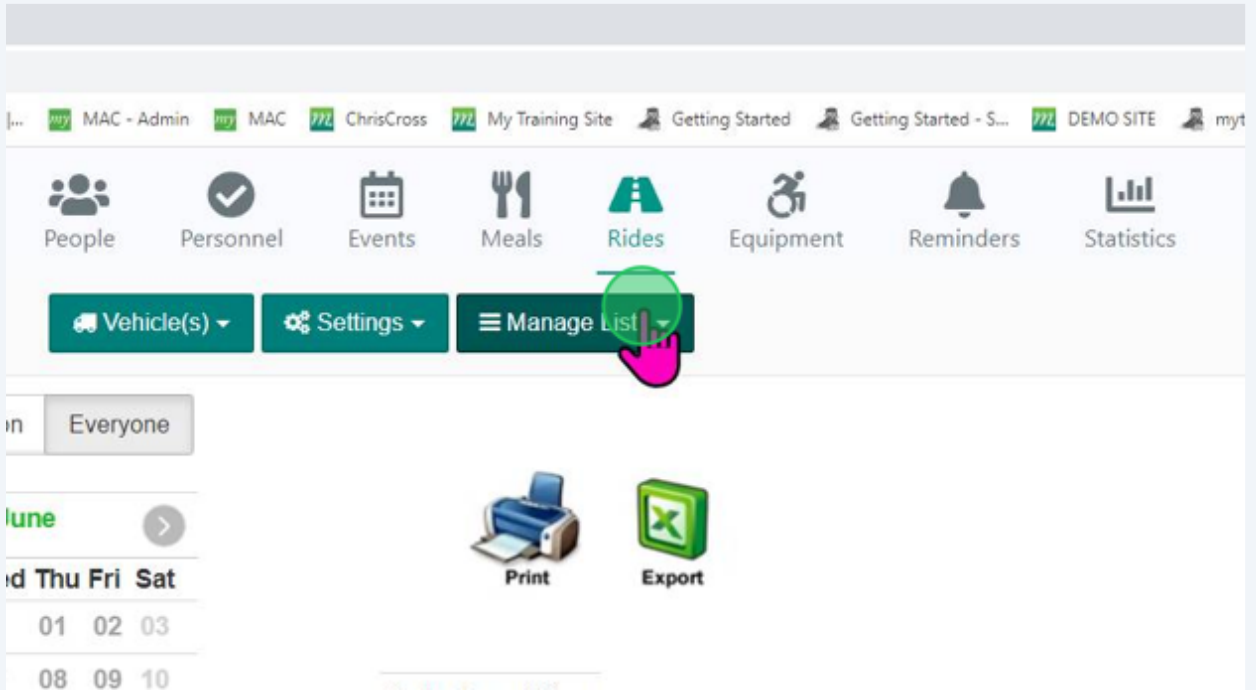
4 Click "Save/Update"



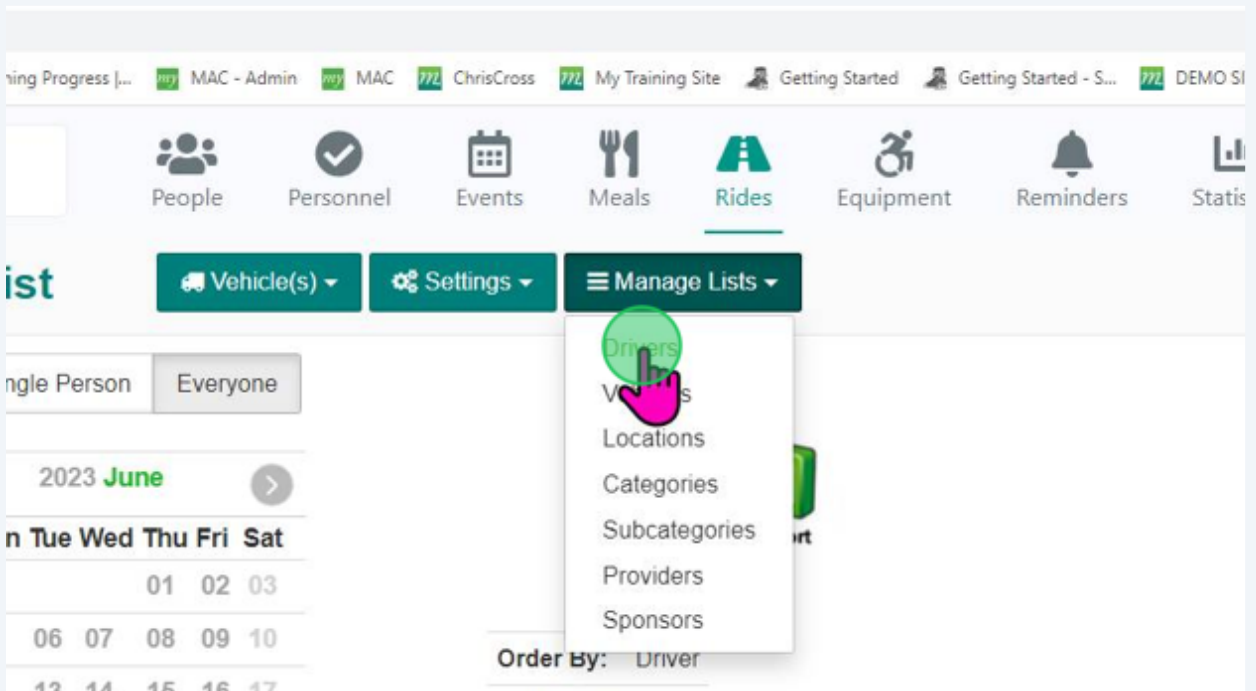
5 Go back to the Rides tab.



6 Click "Manage Lists "

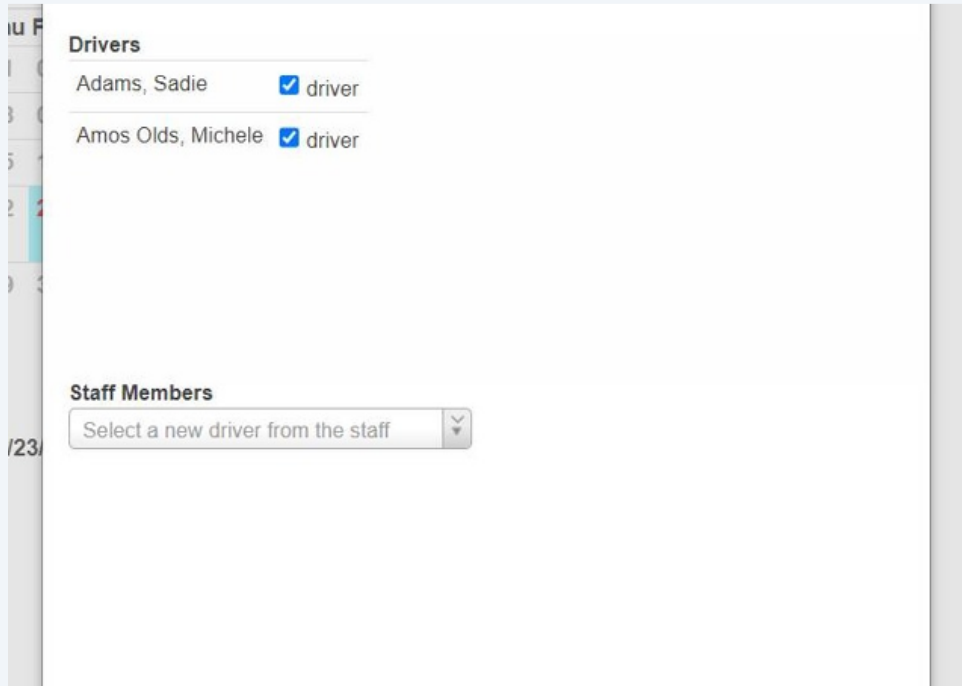


7 Click Drivers



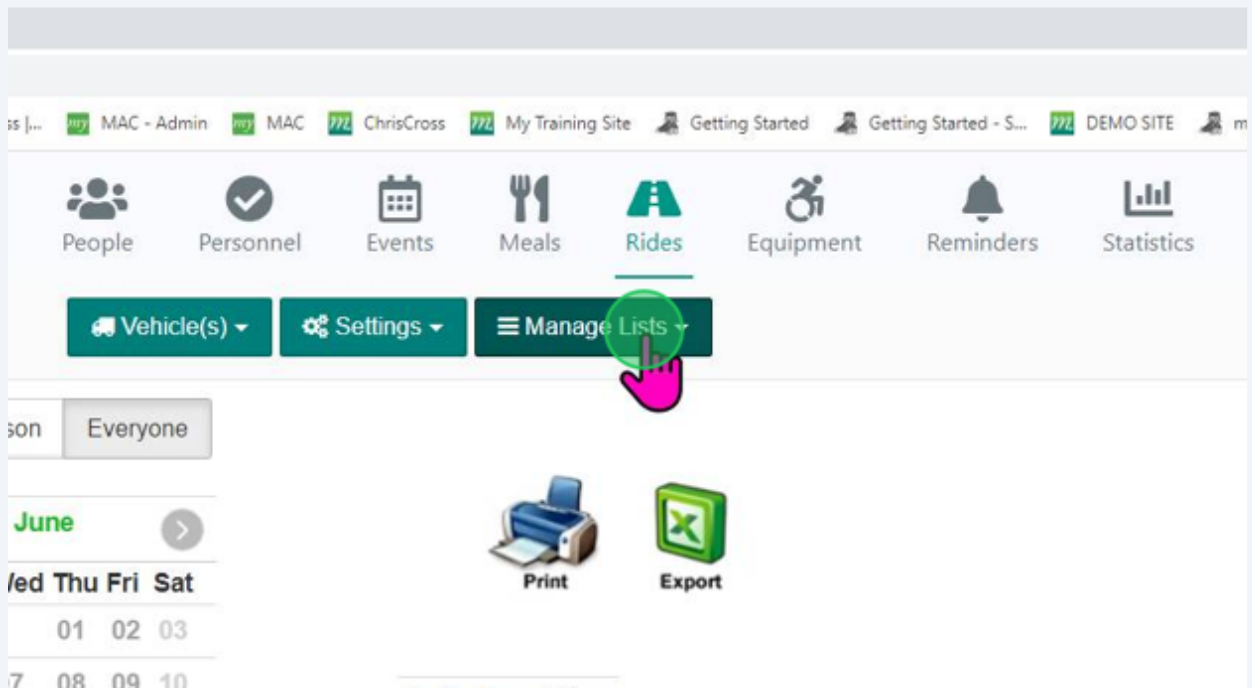
8

You can see you current list of drivers from here and deactivate then by un-checking the box. Close the window.



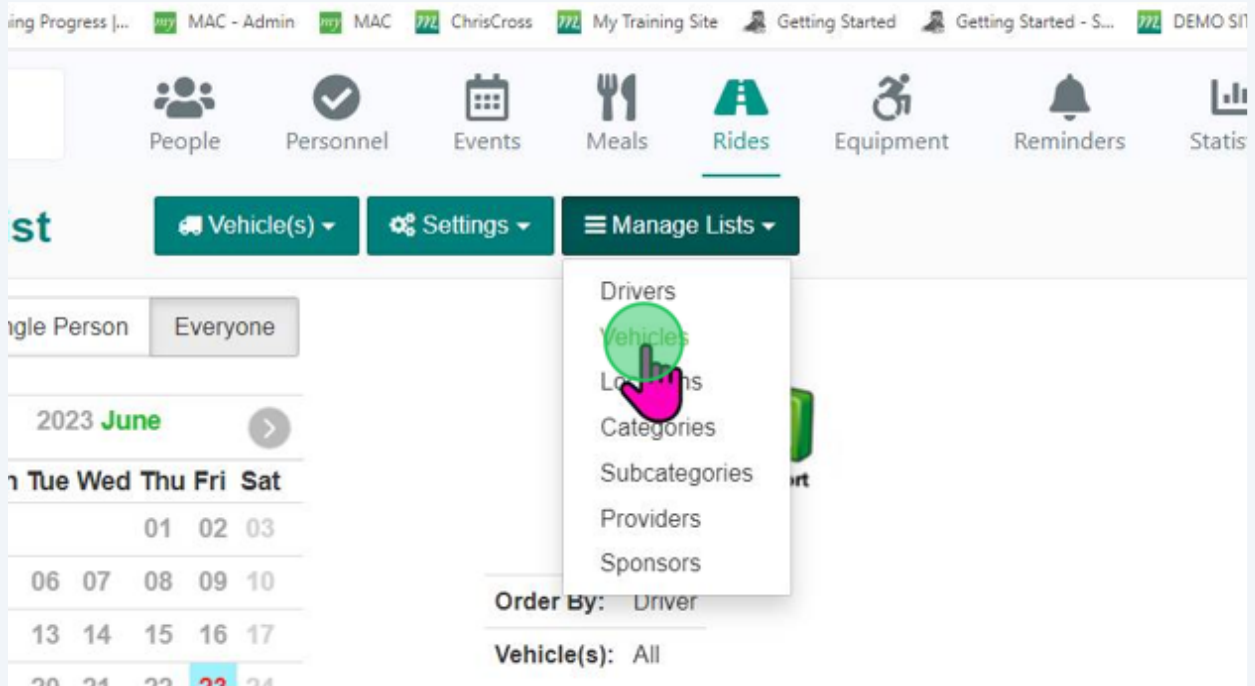
9

Click " Manage Lists "



10

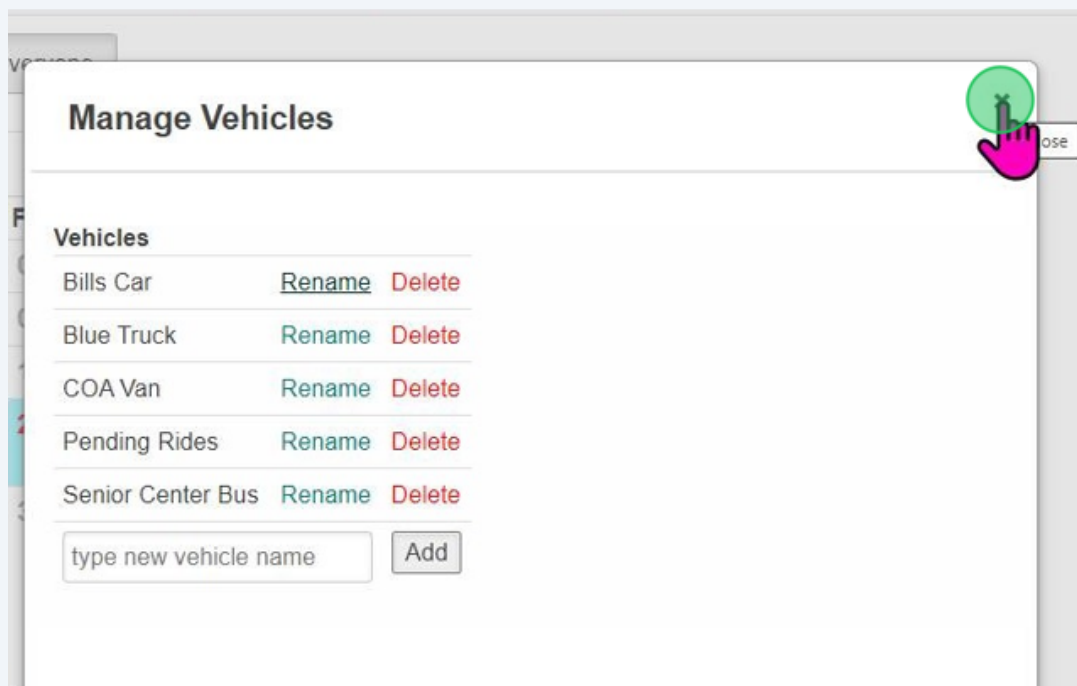
All other Lists can be set up from here. When creating a ride these are all the items you'll be able to choose from. They are not all required but this is what will be available. Click Vehicles.



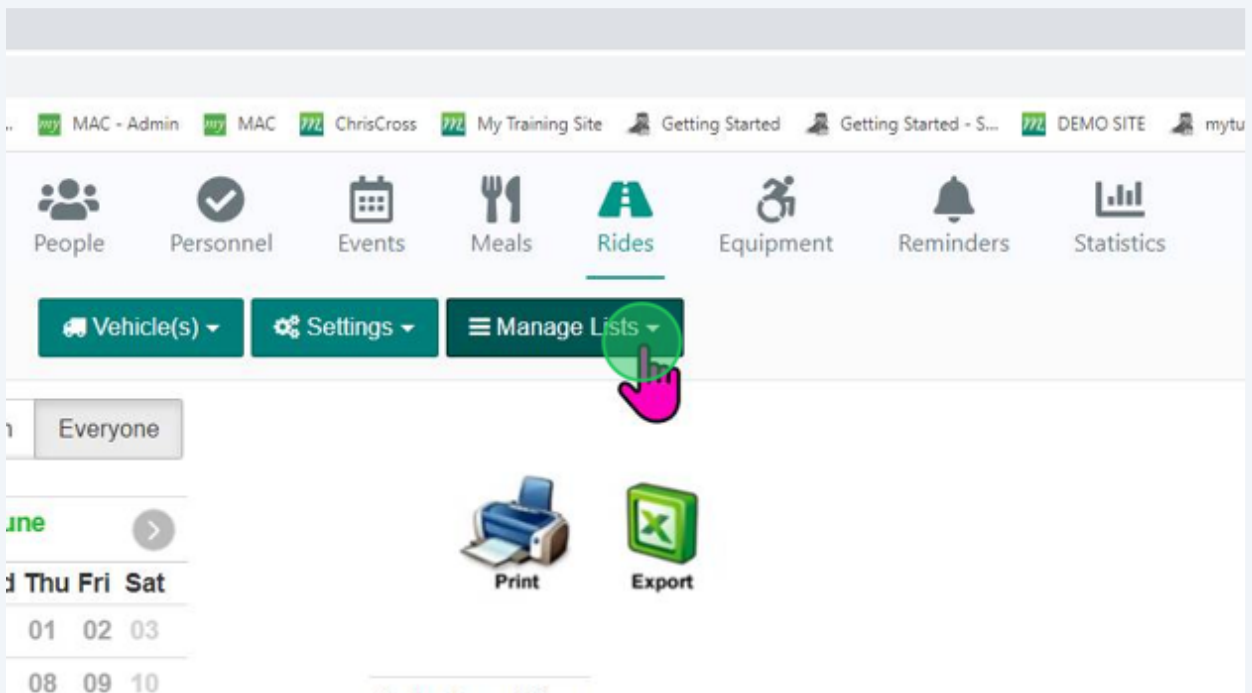
11

Here you can add a new choice by typing a name into the text box and clicking Add. You can also Rename and Delete. Renaming and deleting only affects what's available to choose from in the future and does not affect past rides. All other lists work the same exact way except for Locations.

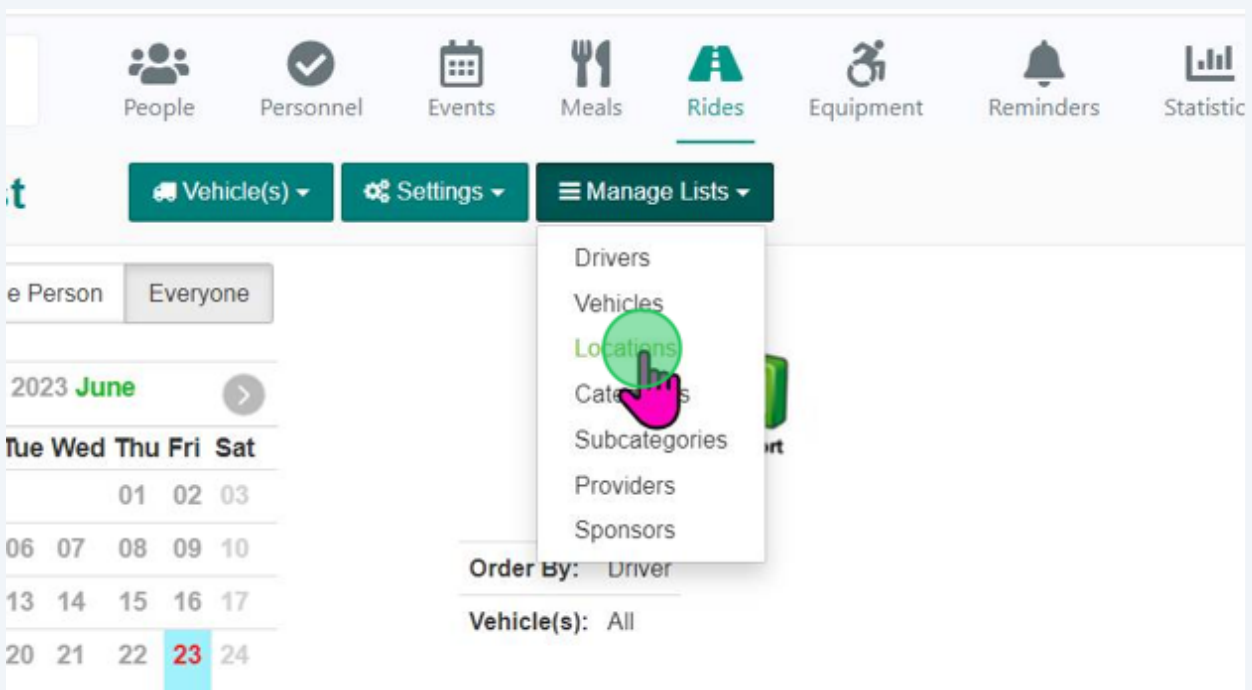
Close the window.



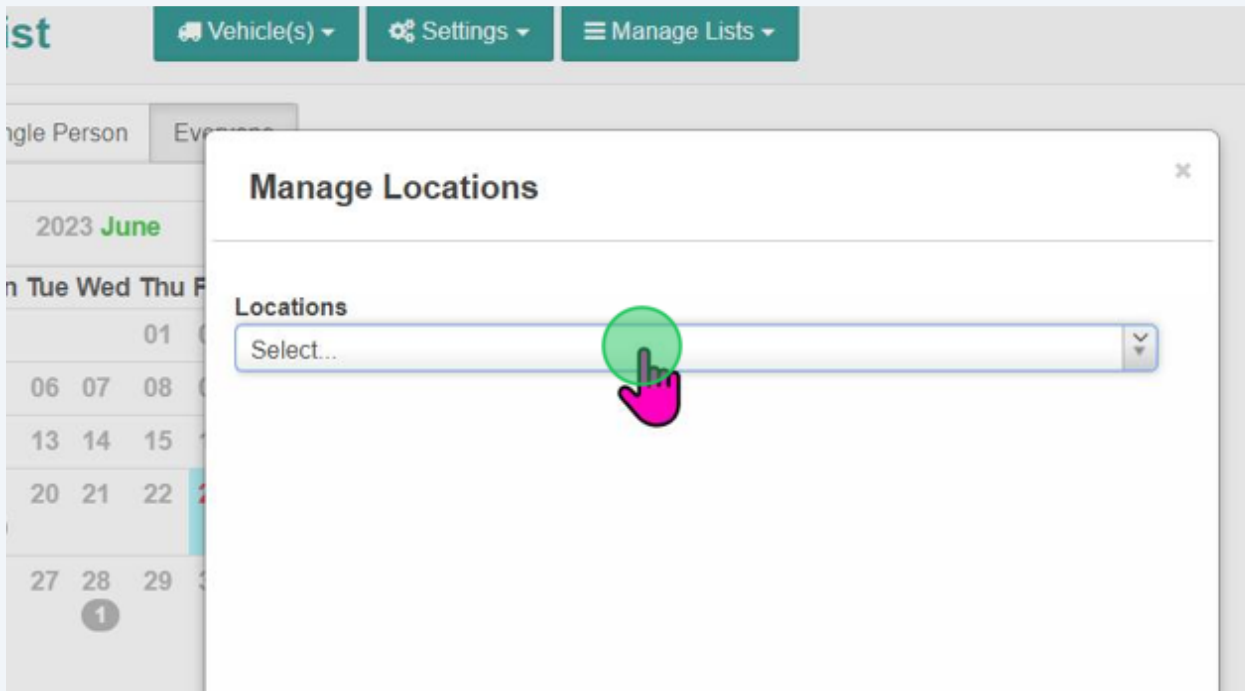
12 Click "Manage Lists "



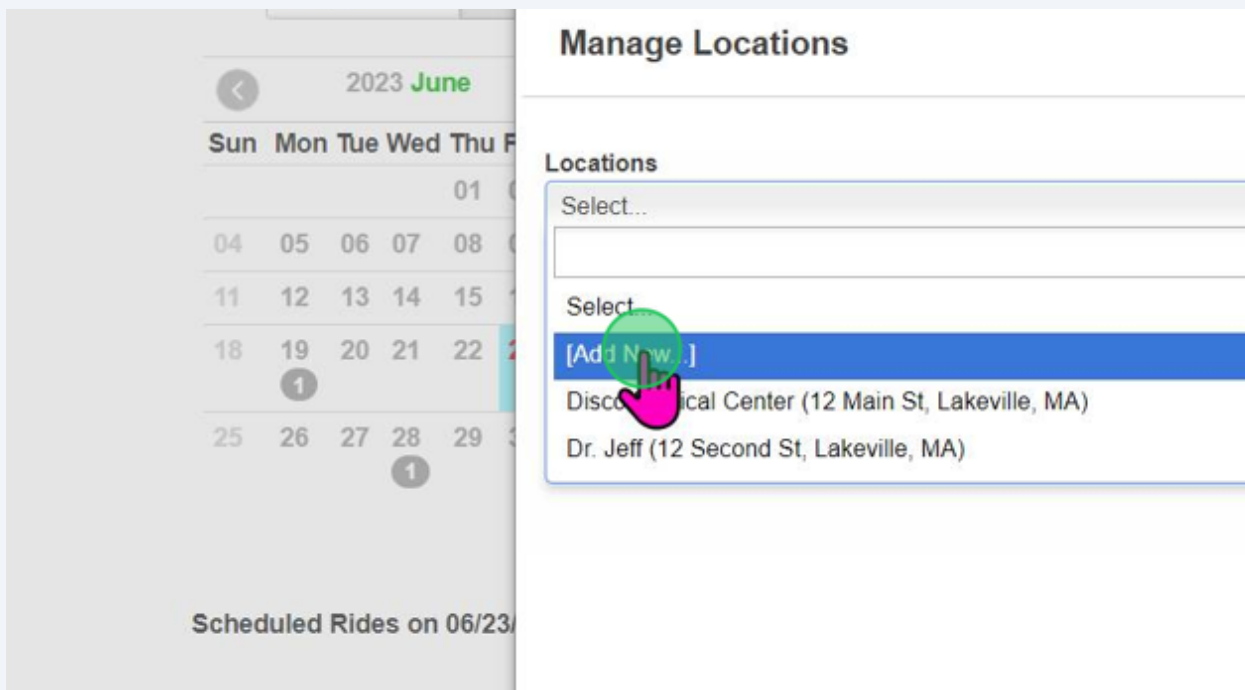
13 Click Locations



14 Click Select

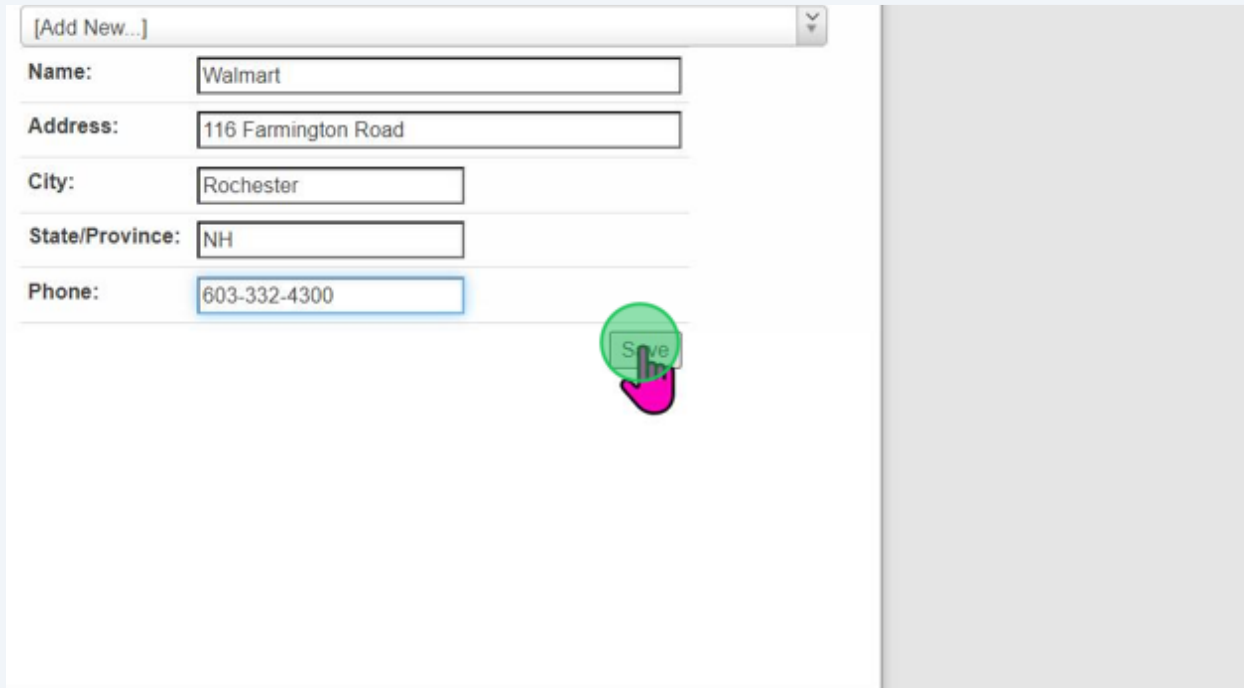


15 Click Add New



16

Here you can create a list of locations to give people rides to. This build a quick searchable list when creating rides that you can choose locations from rather than typing them in over and over. You do not need to re-enter people's home addresses as these already exist in the People tab. Click Save to save your new location.



The screenshot shows a web form for adding a new location. At the top left is a dropdown menu with the text "[Add New...]". Below it are five input fields, each with a label and a value: "Name:" with "Walmart", "Address:" with "116 Farmington Road", "City:" with "Rochester", "State/Province:" with "NH", and "Phone:" with "603-332-4300". The "Phone:" field is highlighted with a blue border. To the right of the form is a large grey rectangular area. A green circular button with the word "Save" is positioned to the right of the form, and a pink hand cursor is pointing at it.

17

Once all of the lists you'll be using are set up you can start scheduling rides.

Scheduling a Ride

18

Typically day today you'll be coming to the rides tab under everyone mode and printing out all of the rides for the day in doing so you'll get. A driver's sheet for each individual driver.

The screenshot shows the 'Ride List' interface for 'The MSC North Center'. At the top, there are navigation tabs: People, Personnel, Events, Meals, and Rides (which is selected). Below the tabs, there are buttons for 'Vehicle(s)', 'Settings', and 'Manage Lists'. The main content area features a mode selector with 'Single Person' and 'Everyone' options; 'Everyone' is currently selected and highlighted with a pink hand icon. Below the mode selector is a calendar for '2023 June' with days of the week (Sun-Sat) and dates (01-17). To the right of the calendar are 'Print' and 'Export' icons. At the bottom right, there are settings for 'Order By: Driver' and 'Vehicle(s): All'.

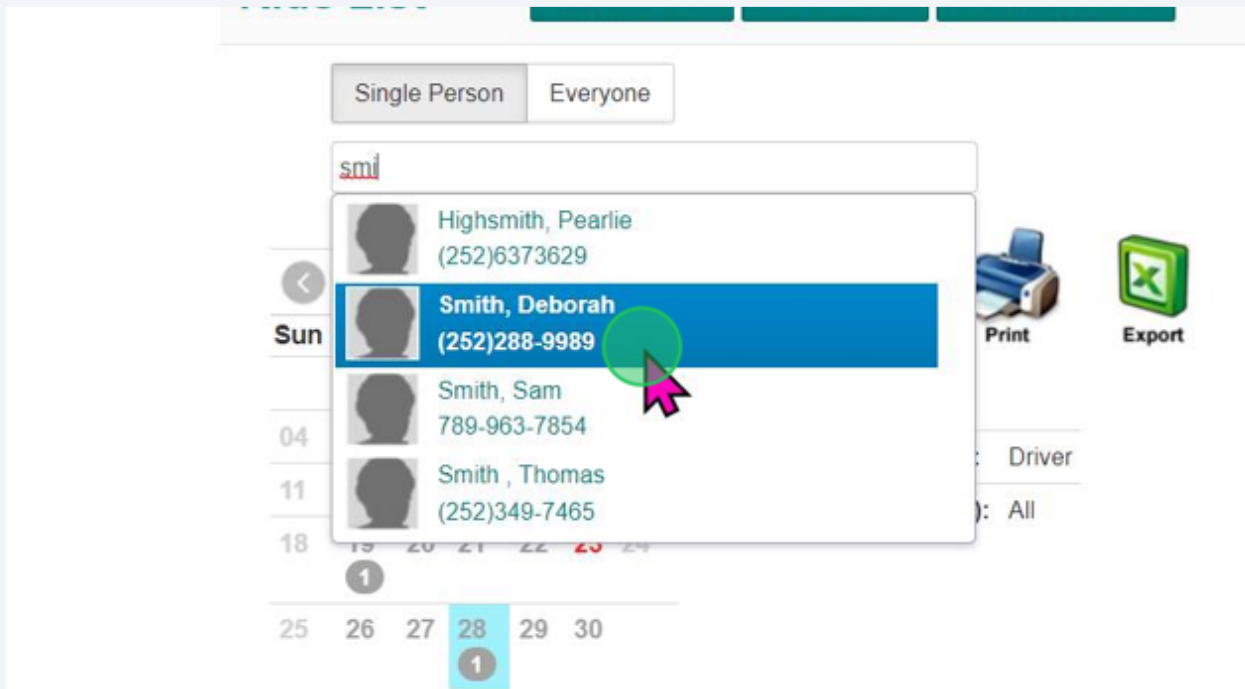
19

Let's switch over to single person mode.

The screenshot shows the 'Ride List' interface for 'The MSC North Center' after switching to 'Single Person' mode. The navigation tabs are the same, but 'Rides' is no longer selected. The mode selector now has 'Single Person' selected and highlighted with a pink hand icon, while 'Everyone' is unselected. The calendar for '2023 June' and the 'Print' icon are still present. The 'Order By: Driver' and 'Vehicle(s): All' settings are also visible at the bottom right.

20

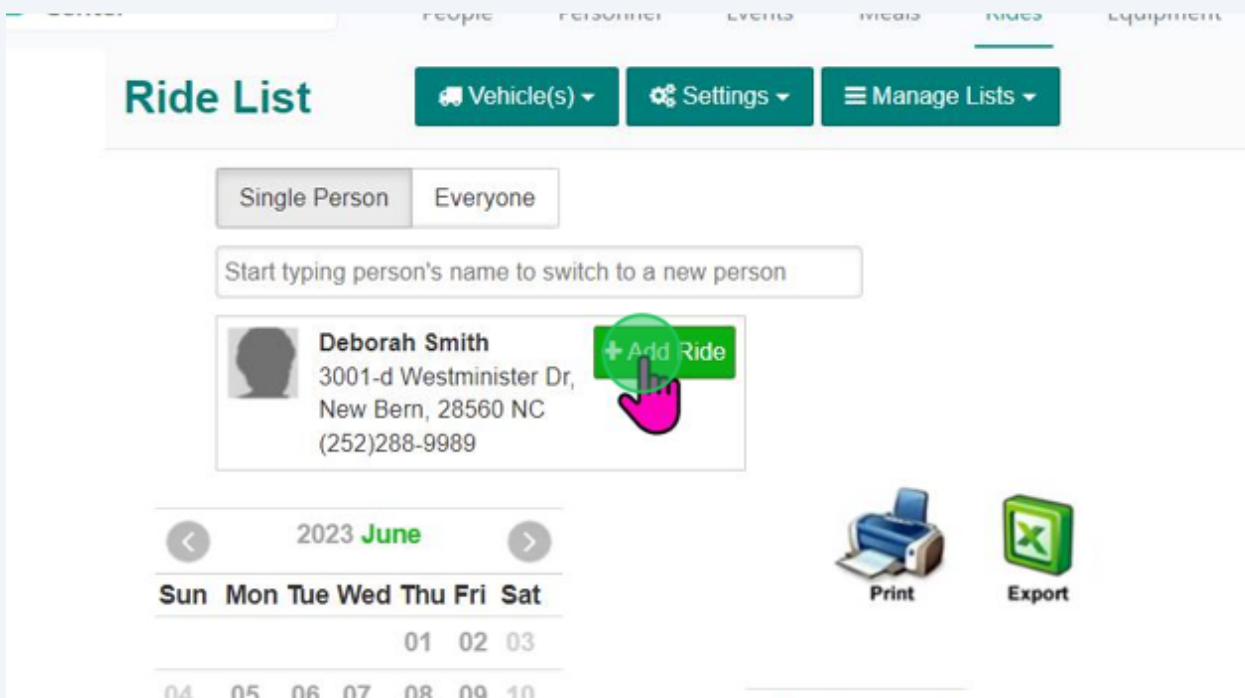
Start typing in a name and you'll get a drop down list of anybody that matches what you've typed so far. Click on a person.



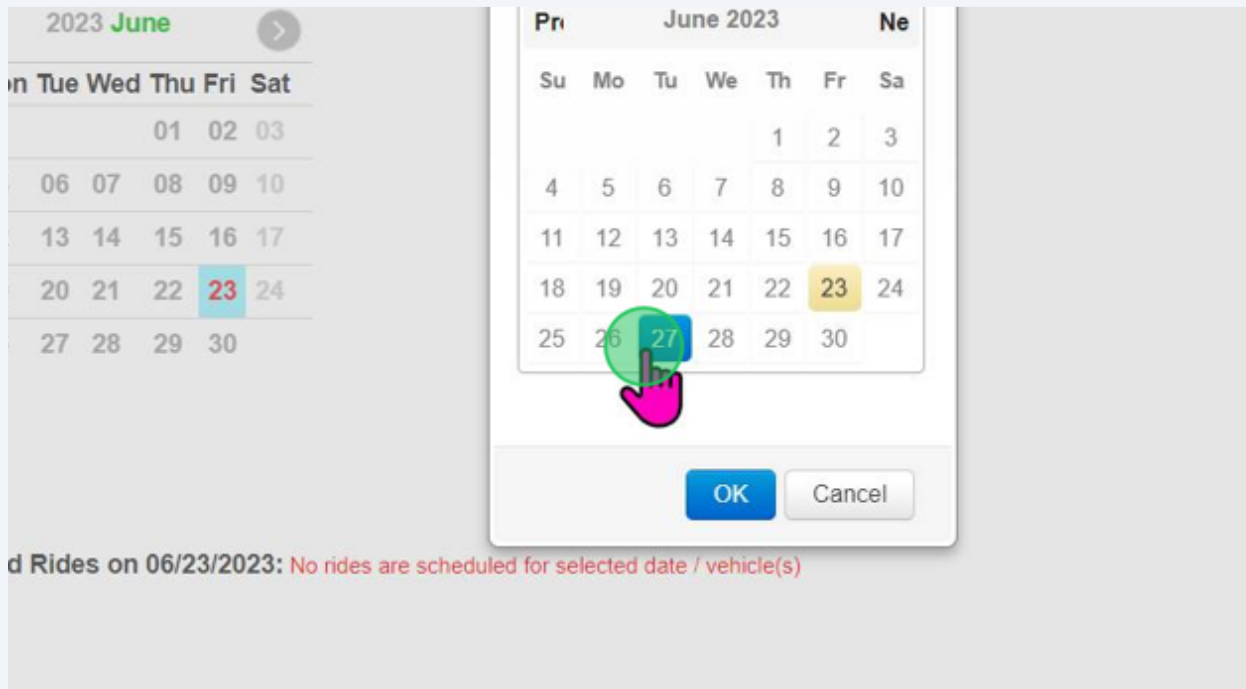
21

Now we're only going to see the rides for that particular person but also in single person mode we have the add ride button.

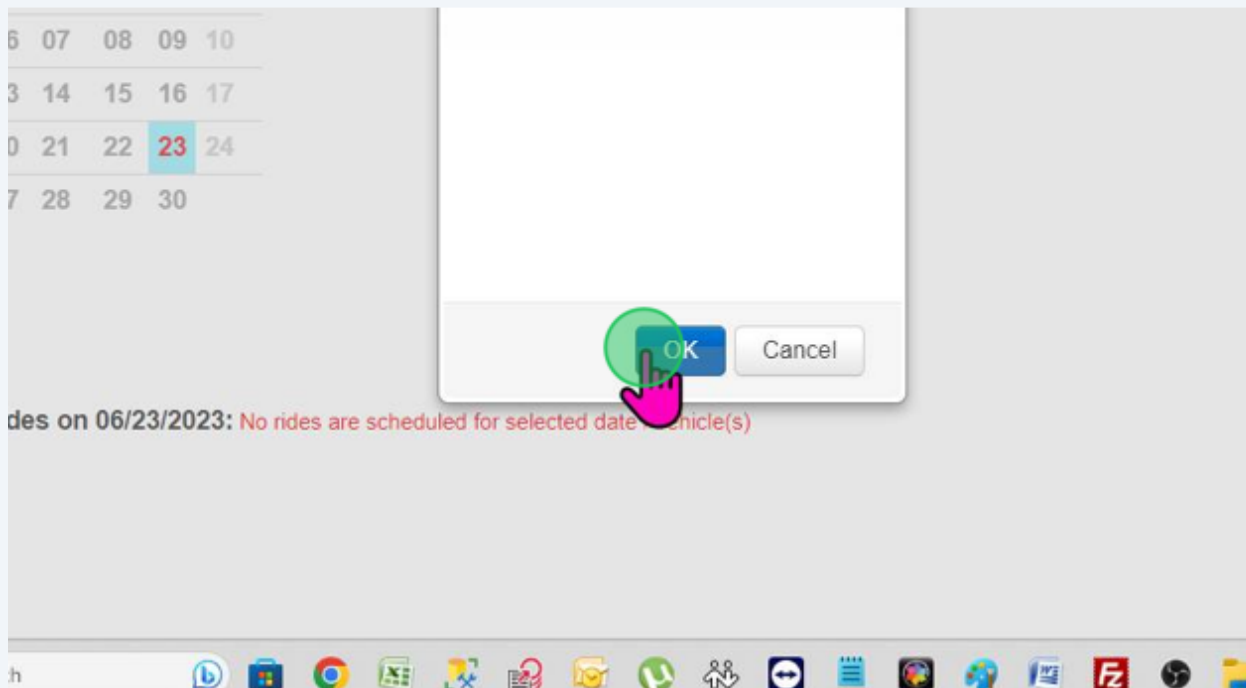
Click Add Ride.



22 Choose an initial date for the ride. We'll be able to copy the ride later on.



23 Click "OK"



24

Choose a pick up time for your ride and a pick up location. Click on the location drop down and you'll see a list of the locations you entered while setting rides up .This is a searchable list so if you start typing in the search Box the list will narrow down to match what you've typed.

Click on a location to select it.

The screenshot displays a ride scheduling interface. On the left, a calendar shows the date 06/27/2023 selected. The main form includes fields for Date (06/27/2023), Pickup Time (08:00 AM), and Pickup Location. The Pickup Location dropdown menu is open, showing a list of locations. A pink hand icon points to the selected location: "Home - Smith, Deborah (3001-d Westminister Dr, , New Bern, NC)". Other locations listed include "Disco Medical Center (12 Main St, Lakeville, MA)", "Dr. Jeff (12 Second St, Lakeville, MA)", and "Walmart (116 Farmington Road, Rochester, NH)".

Date:	06/27/2023
Pickup Time:	08:00 AM
Pickup Location:	Unassigned
Vehicle:	Unassigned
Driver:	Unassigned
Category:	Popular Locations
Subcategory:	Home - Smith, Deborah (3001-d Westminister Dr, , New Bern, NC)
Provider:	Other Locations
Fee:	0
Account:	

25

Now you can choose a vehicle, a driver, a category, a subcategory, a provider, enter a fee which will create an invoice under that person's payment screen, choose a payments received account for the fee to be allocated to and choose a sponsor. If you already know what the mileage is you can enter it now but in a future step you'll learn how to get that mileage. All fields are optional.

Pickup Location:	Home - Smith, Deborah (3001-d Westminister Dr, , New Bern, NC)
Vehicle:	Bills Car
Driver:	Amos Olds, Michele
Category:	Non-Medical
Subcategory:	Shopping
Provider:	Senior Center
Fee:	0
Account:	Senior Center
Sponsor:	Senior Center
Mileage:	12

26

Enter in any notes you want to appear on the driver's sheet for the driver and click Save Changes.

enter

enter

r has a walker.

Save Changes Cancel

27

In the next window indicate the destination and drop off time. Select a drop off time and select a destination location from the same list location list as before. Click OK and you're done creating that ride.

Add Destination

Dropoff Time: 08:15 AM

Destination: Walmart (116 Farmington Road, Rochester, NH)

Passengers: All/None
 Smith, Deborah

OK Cancel

28

Every ride you create has a drop down menu where a handful of actions are available.

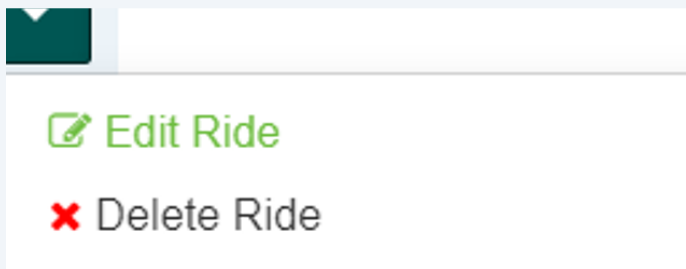
ion

Smith, Deborah
Westminister Dr,
1, NC 28560
-9989

- Edit Ride
- Delete Ride
- Copy Ride
- Create Return Ride
- Delete Multiple Rides
- + Add Destination
- Select Passengers Destinations
- Remove Destination
- + Add Pickup as Destination
- + Add Passenger

Edit or Delete a Ride

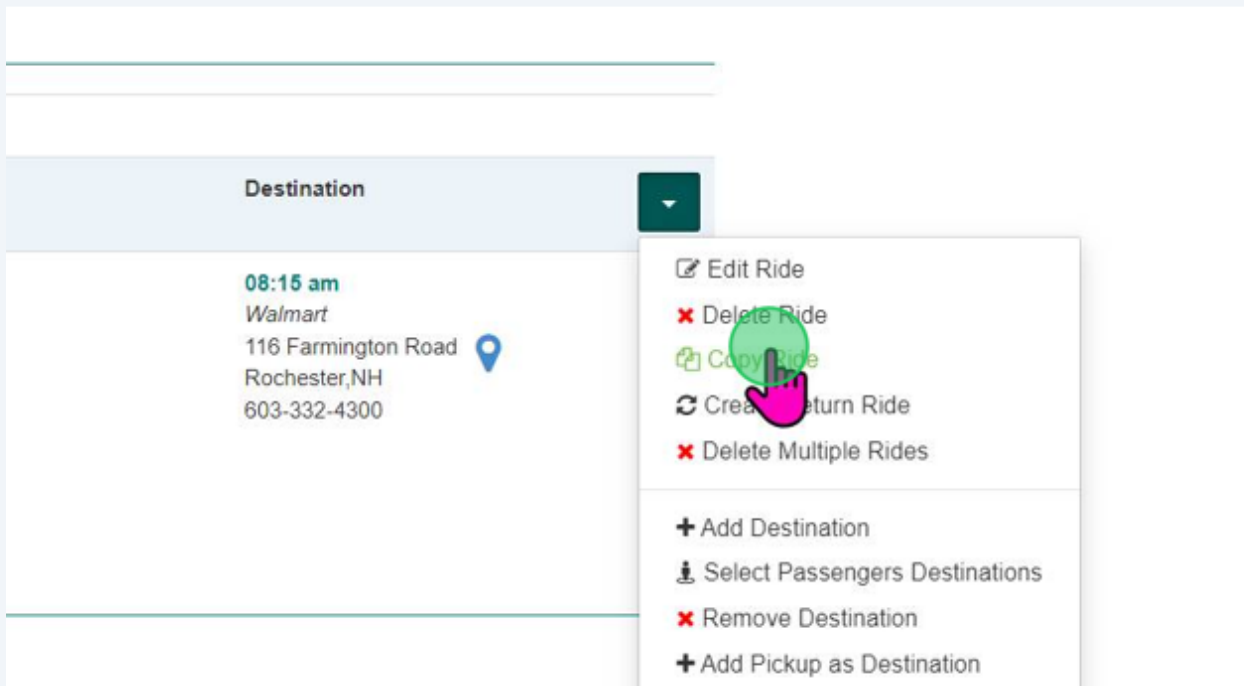
- 29 You can always edit a ride. Nothing is set in stone and of course you can delete a ride as well.



Copy a Ride

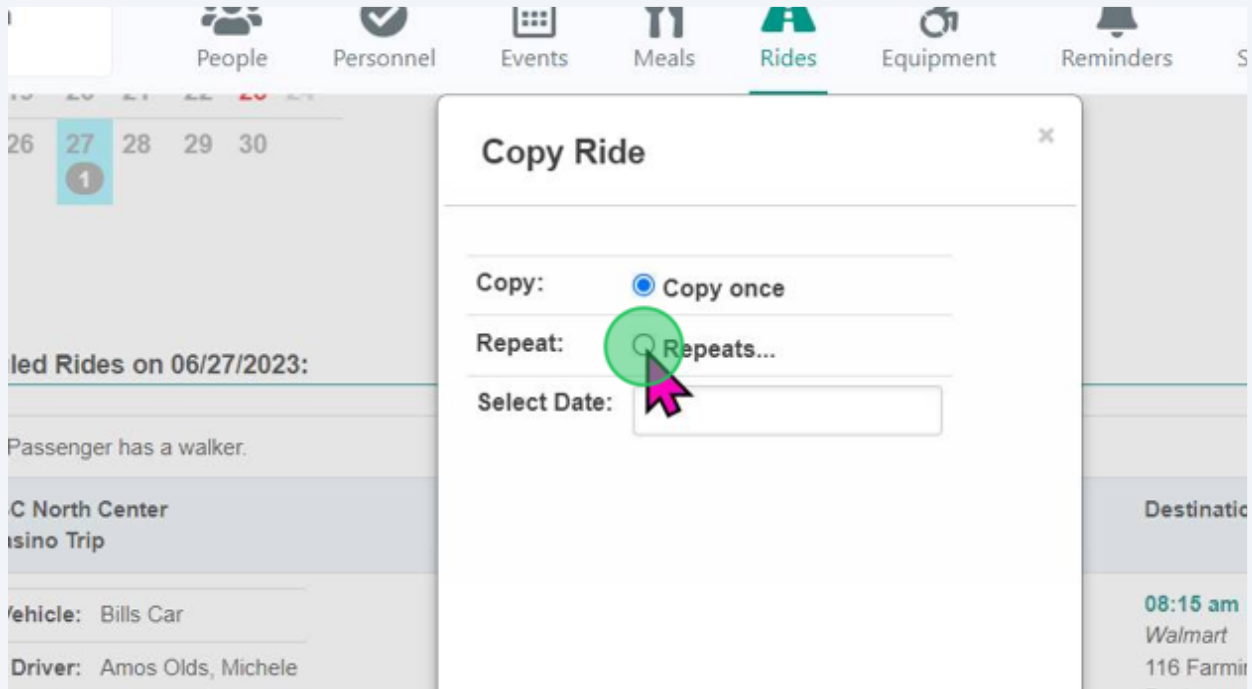
- 30 Copying rides can come in really handy especially if you have regular riders that get the same rides every week.

Click Copy Ride.



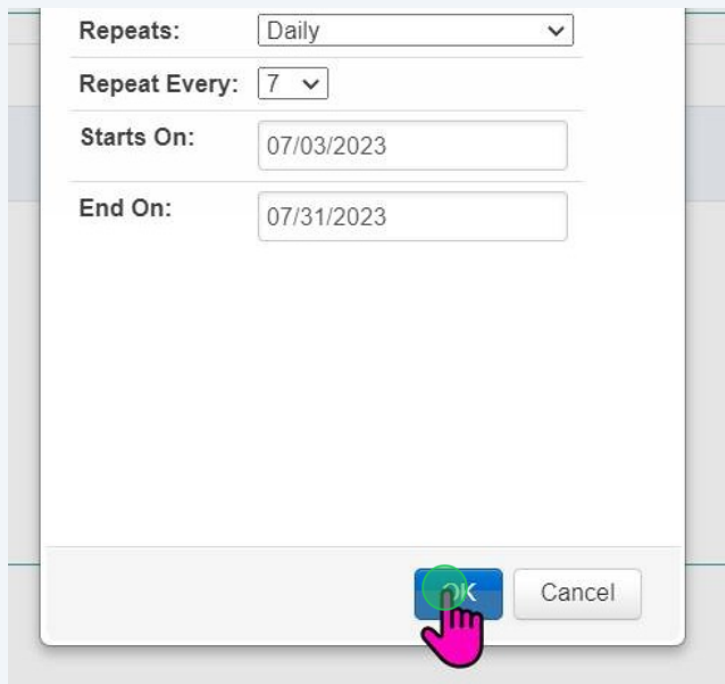
31

You can copy the ride to one single day but you can also copy it to multiple days. Let's select repeats.

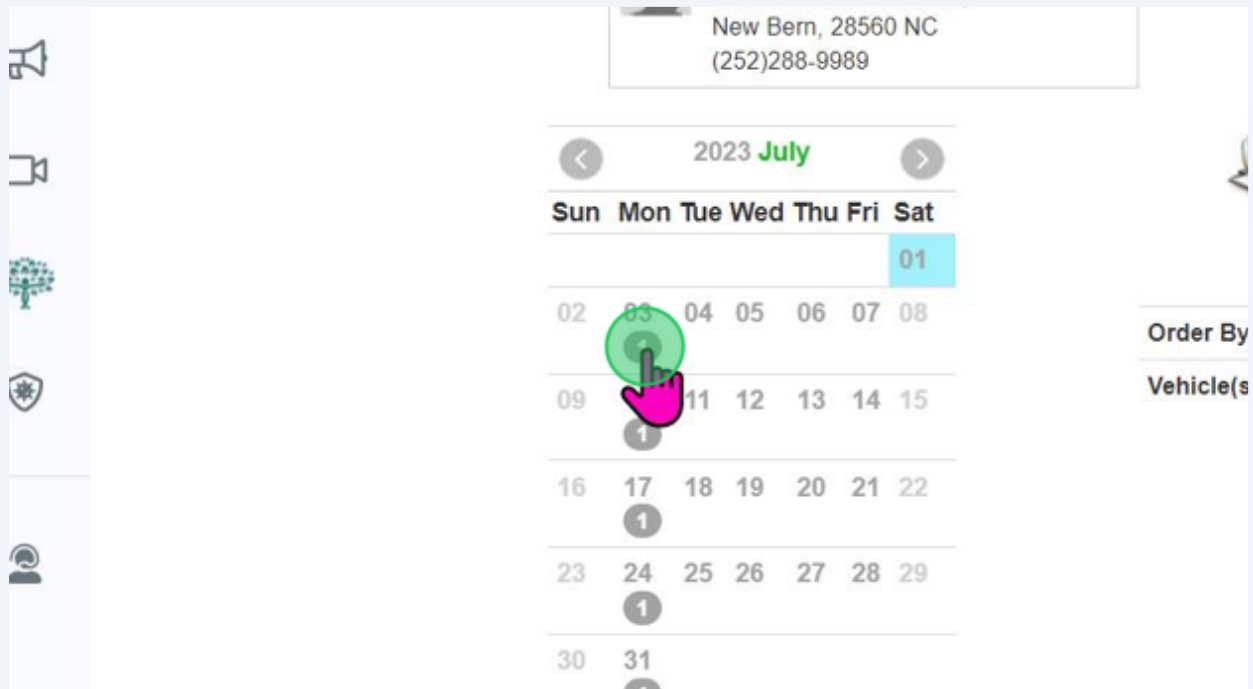


32

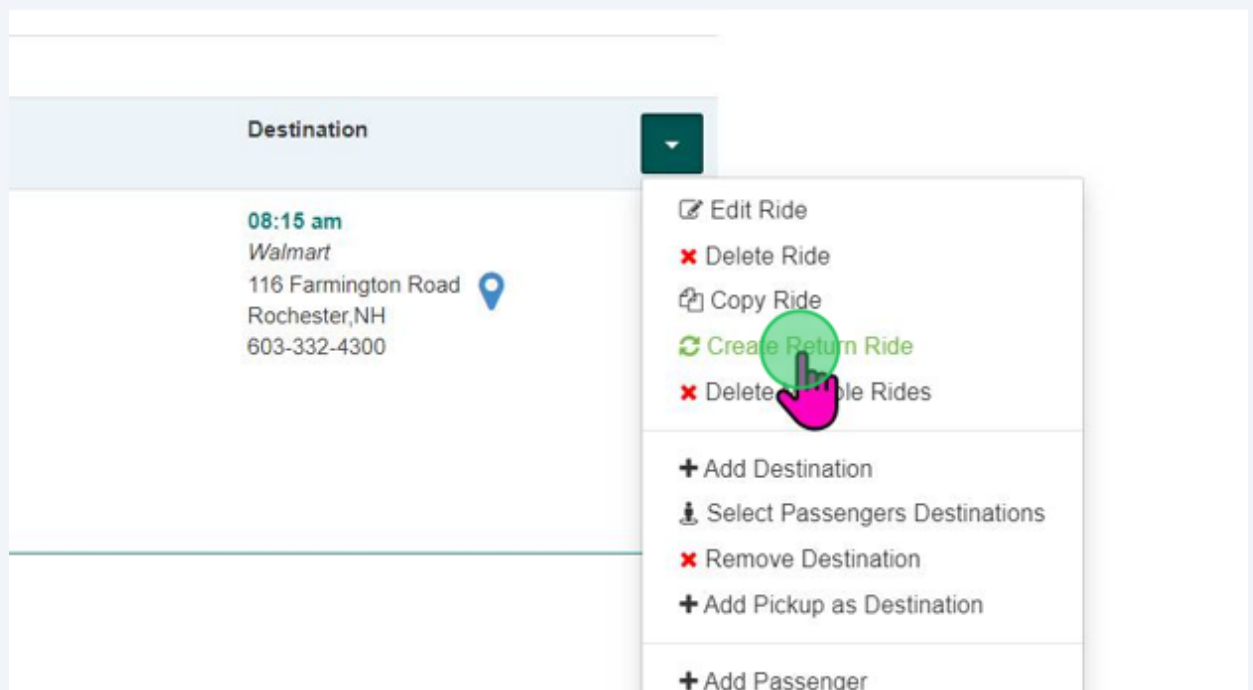
In this example we'll copy this ride to every day in July. Select daily in the "repeats" drop down. Select 7 in the "repeats every" drop down to indicate every 7 days. Choose the date of the 1st Monday and the date of the last Monday then click OK.



33 Now you can see that ride has been copied to every Monday in July.



34 Click back on the drop down menu and select "Create Return Ride".



35

This essentially just copies the ride and swaps the locations.

Driver	Pickup	Destination
Car s Olds, Michele Medical yping n, Deborah)288-9989 d phone log	8:00 am Home - Smith, Deborah 3001-d Westminister Dr, New Bern, NC (252)288-9989	08:15 am Walmart 116 Farmington Road Rochester, NH 603-332-4300
s a walker.		
Car s Olds, Michele	9:15 am Walmart 116 Farmington Road Rochester, NH	09:30 am Home - Smith, Deborah 3001-d Westminister Dr, New Bern, NC 28560

36

Click the drop down menu again and edit the ride.

ion

Smith, Deborah
Westminister Dr,
NC 28560
-9989

- Edit Ride
- Delete Ride
- Copy Ride
- Create Return Ride
- Delete Multiple Rides
- + Add Destination
- Select Passengers Destinations
- + Remove Destination
- + Add Pickup as Destination
- + Add Passenger

37

Now we'll edit the time to indicate the actual time we'll be bringing them back. Click save changes.

The screenshot shows a form with the following fields:

- Pickup Time: 09:15 AM
- Pickup Location: Walmart (116 Farmington Road, Rochester, NH)
- Vehicle: Bills Car
- Driver: Amos Olds, Michele
- Category: Non-Medical
- Subcategory: Shopping
- Provider: Senior Center
- Fee: 0
- Account: (empty)
- Sponsor: Senior Center

At the bottom right, there is a blue "Save Changes" button and a grey "Cancel" button. A hand cursor is pointing at the "Save Changes" button.

38

Now we'll edit the destination time as well. Click directly on the destination time.

Pickup	Destination
<p>9:15 am Walmart 116 Farmington Road Rochester, NH 603-332-4300</p>	<p>08:30 am Home of Smith, Deborah 3001 Westminister Dr, New Bern, NC 28560 (252)288-9989</p>

39 Edit your time and click OK.

The screenshot shows a form with the following fields:

- Dropoff Time:** 09:30 AM (with a clock icon)
- Destination:** Home - Smith, Deborah (3001-d Westminister Dr, , New Bern, NC) (with a dropdown arrow)
- Passengers:**
 - All/None
 - Smith, Deborah

At the bottom right, there are two buttons: a blue 'OK' button and a grey 'Cancel' button. A pink hand icon is pointing at the 'OK' button, which is also circled in green.

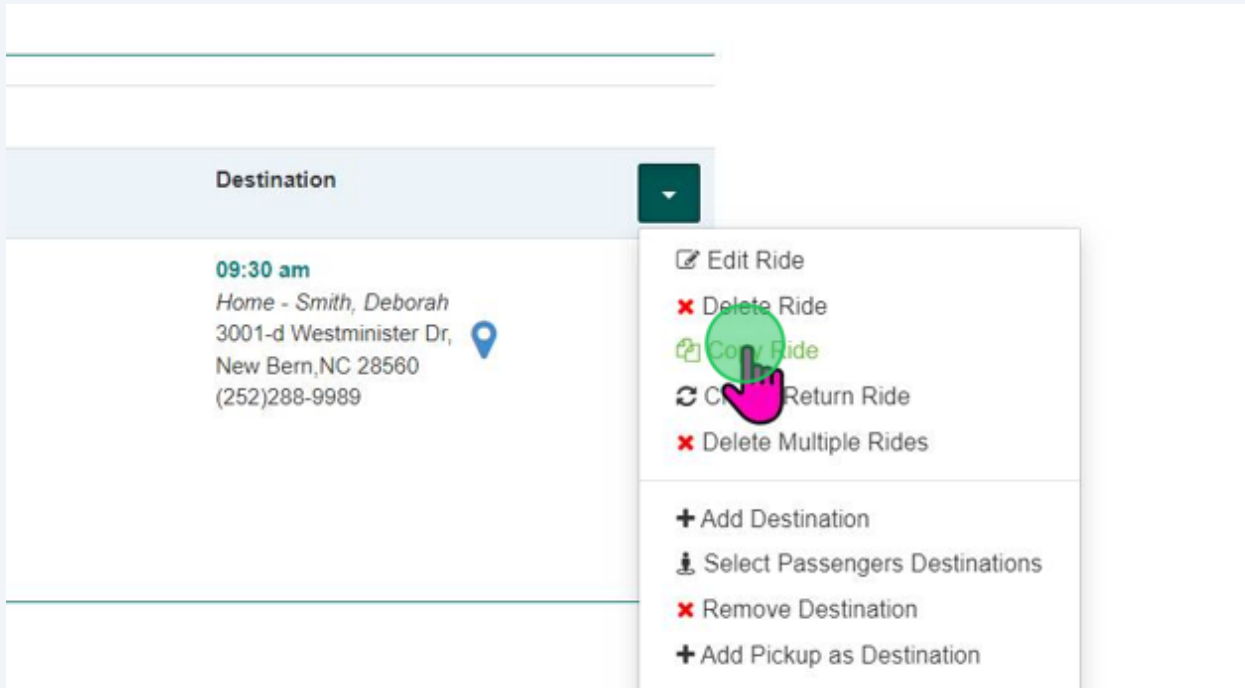
40 Click back on the drop down list

The screenshot shows a summary card with the following information:

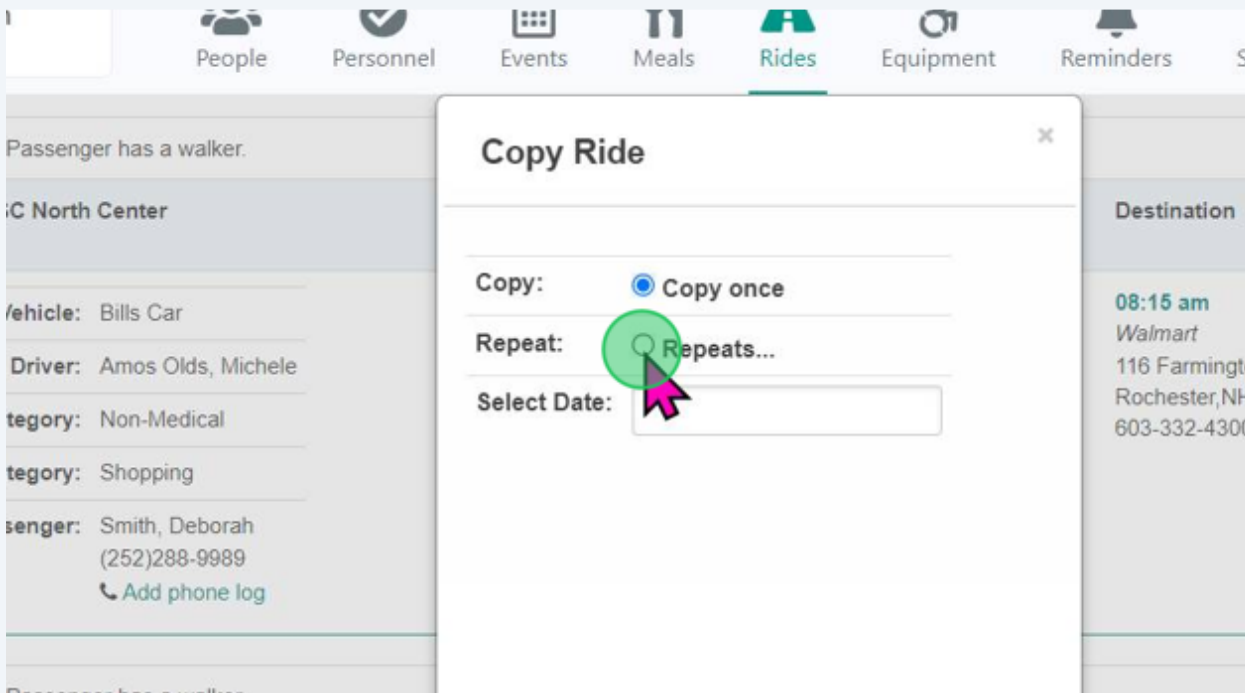
- Destination** (with a dropdown arrow icon)
- 09:30 am**
- Home - Smith, Deborah*
- 3001-d Westminister Dr, New Bern, NC 28560 (with a location pin icon)
- (252)288-9989

A pink hand icon is pointing to the dropdown arrow icon next to the 'Destination' header, which is also circled in green.

41 Select copy again



42 Now we're going to copy the return ride to every Monday in July as well. Choose repeats.



43

Repeat every 7 days and choose the 1st Monday and the last Monday again just like before.

Repeat. Repeats...

Repeats: Daily

Repeat Every: 7

Starts On: 07/03/2023

End On: 07/31/2023

OK Cancel

44

Now every Monday has a ride to the destination and a ride back. You can always go back and edit any individual day if needed.

Calendar view showing scheduled rides on 07/10/2023. The 1st, 8th, 15th, 22nd, and 29th are marked with a '2' in a circle.

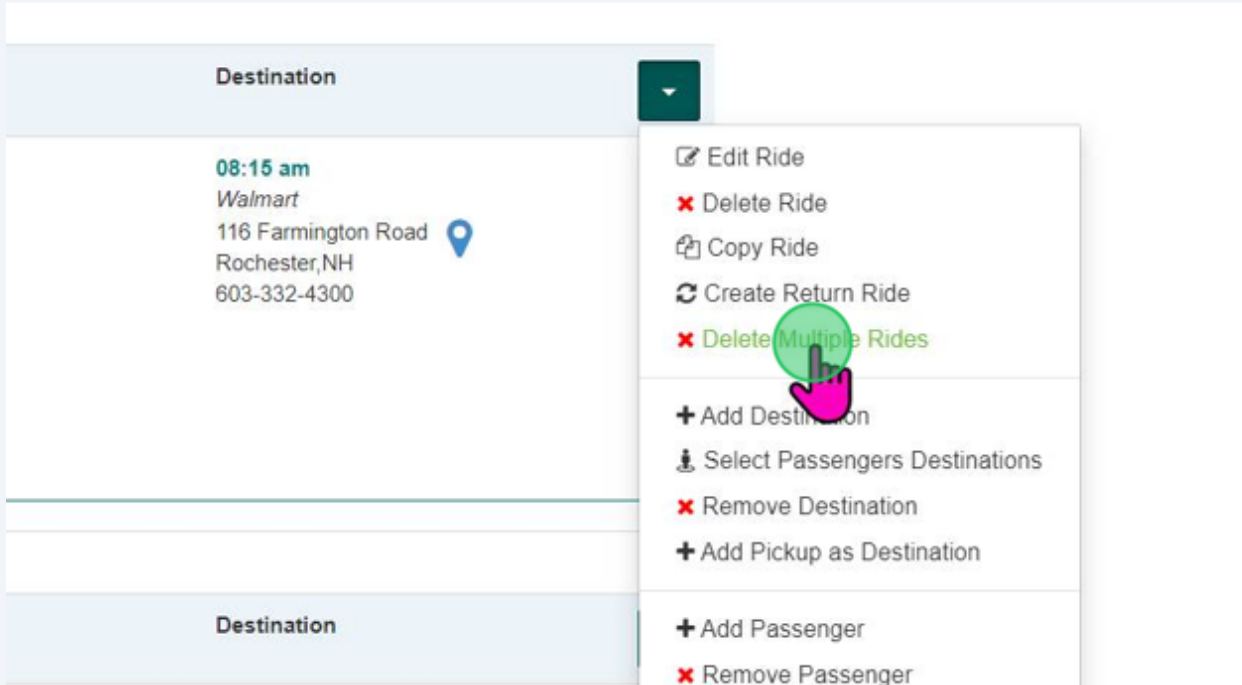
Scheduled Rides on 07/10/2023:

Notes: Passenger has a walker.	
The MSC North Center	Pickup
Vehicle: Bills Car	8:00 am
Driver: Amos Olds, Michele	Home - Str
Category: Non-Medical	3001-d We
Subcategory: Shopping	New Bern,
	(252)288-9

Delete Multiple Rides

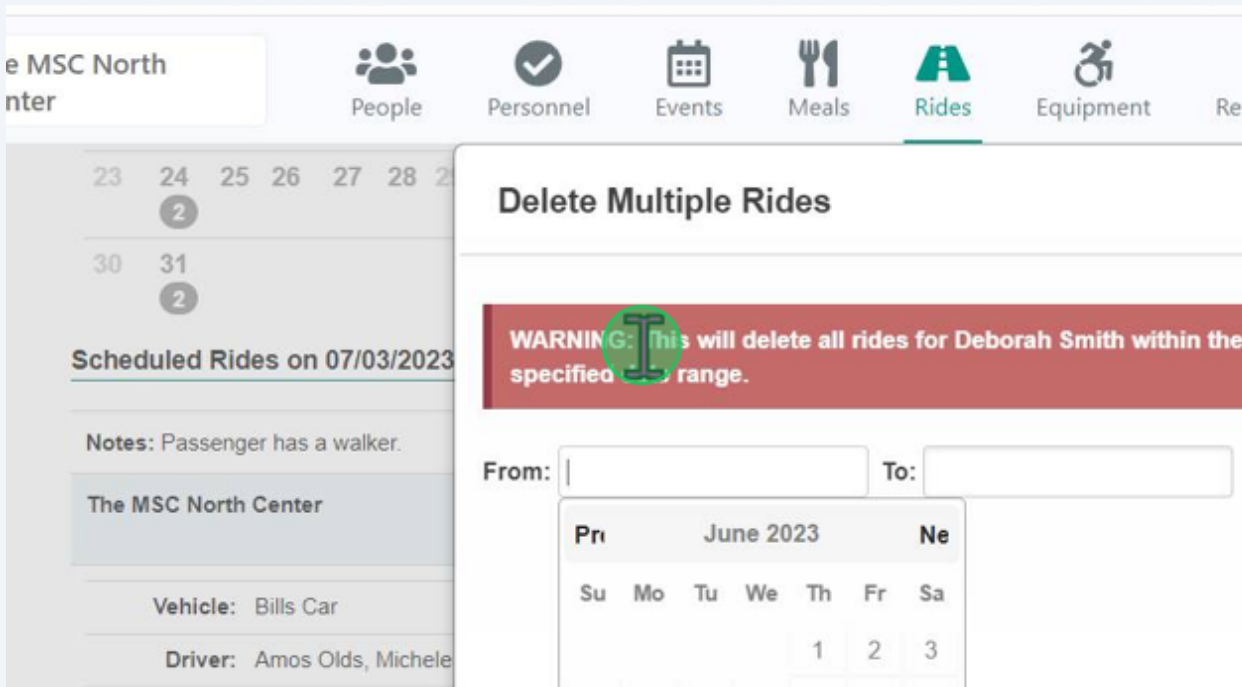
45

If you schedule rides out far in advance and something changes you can delete multiple rides if you need to. Make sure you're under single person mode, Click the drop down menu for any ride and select "Delete Multiple Rides".

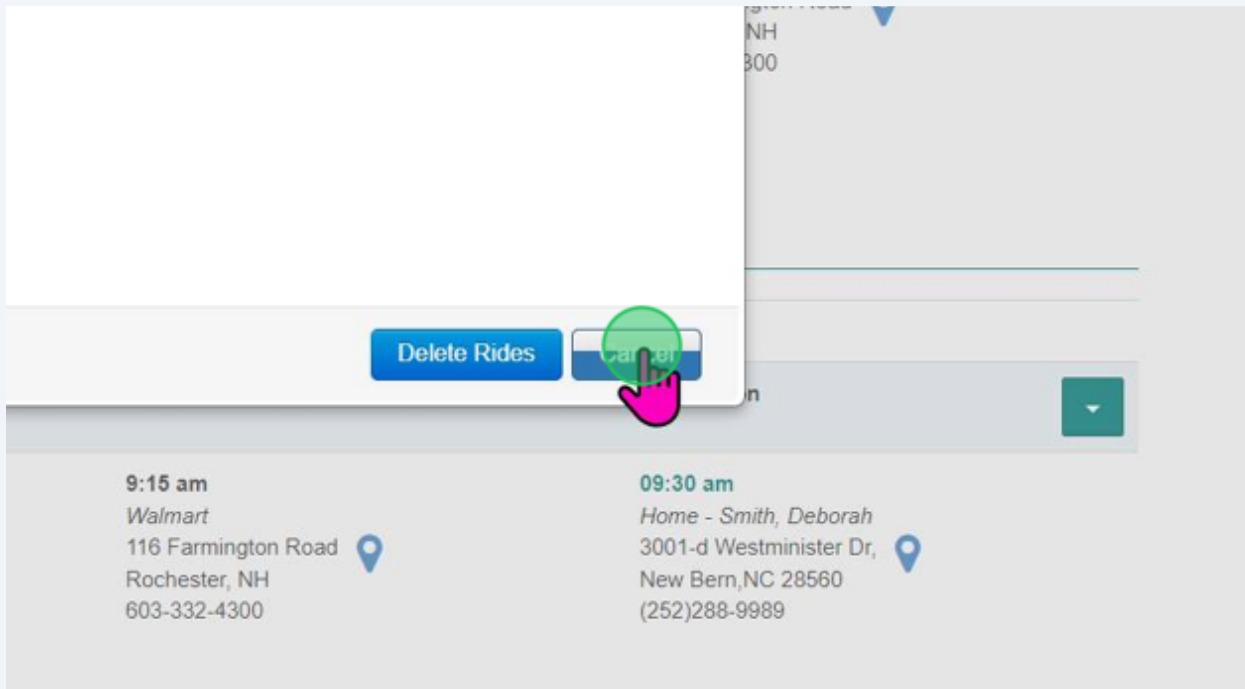


46

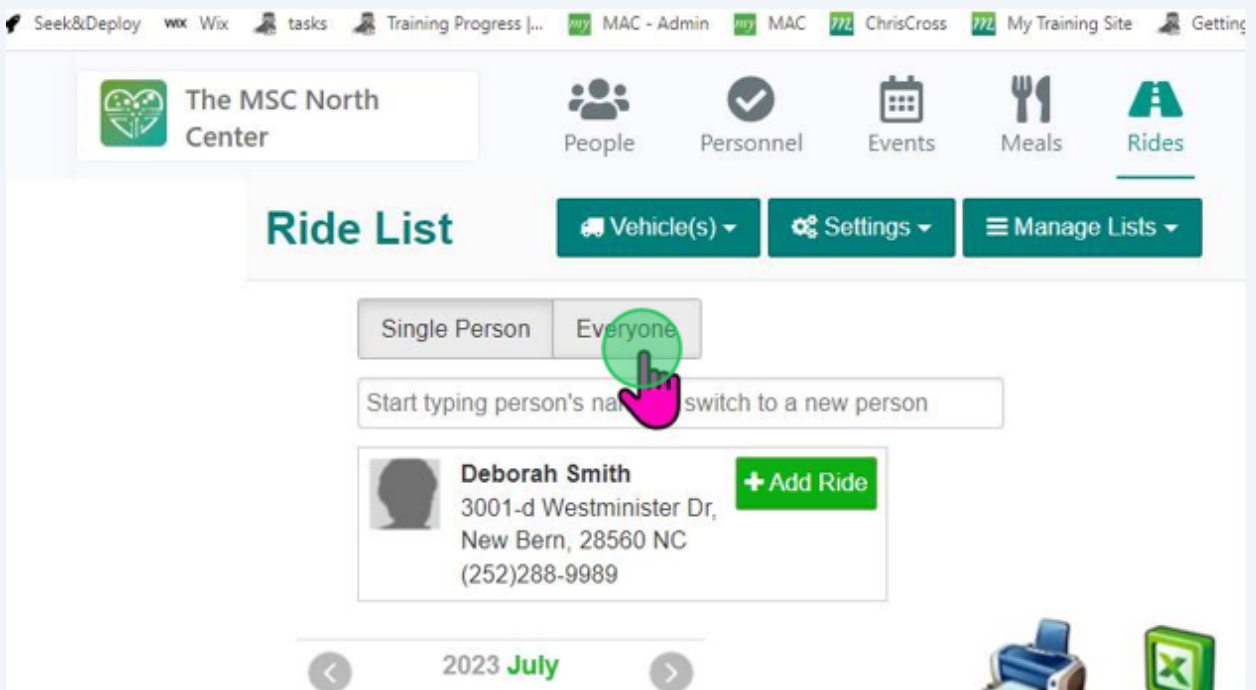
Here you'll notice we're deleting rides for a single person. Enter a Starting and Ending date and you'll be able to delete all rides within that date range.



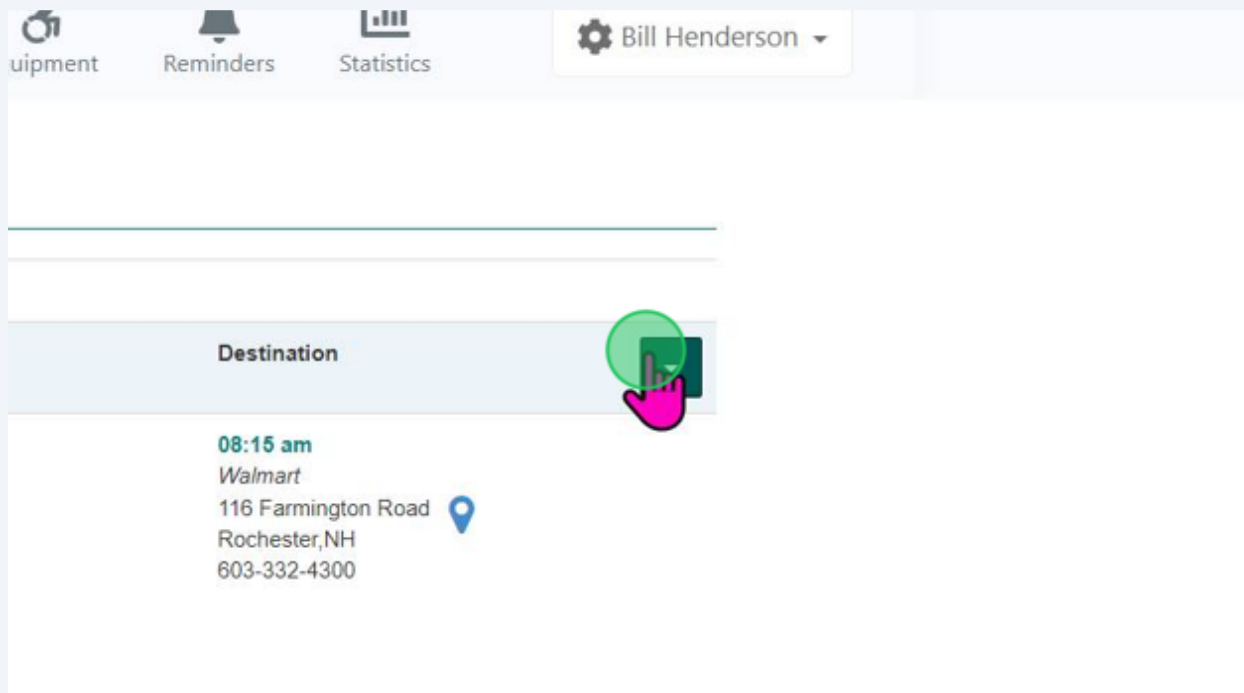
47 Click cancel



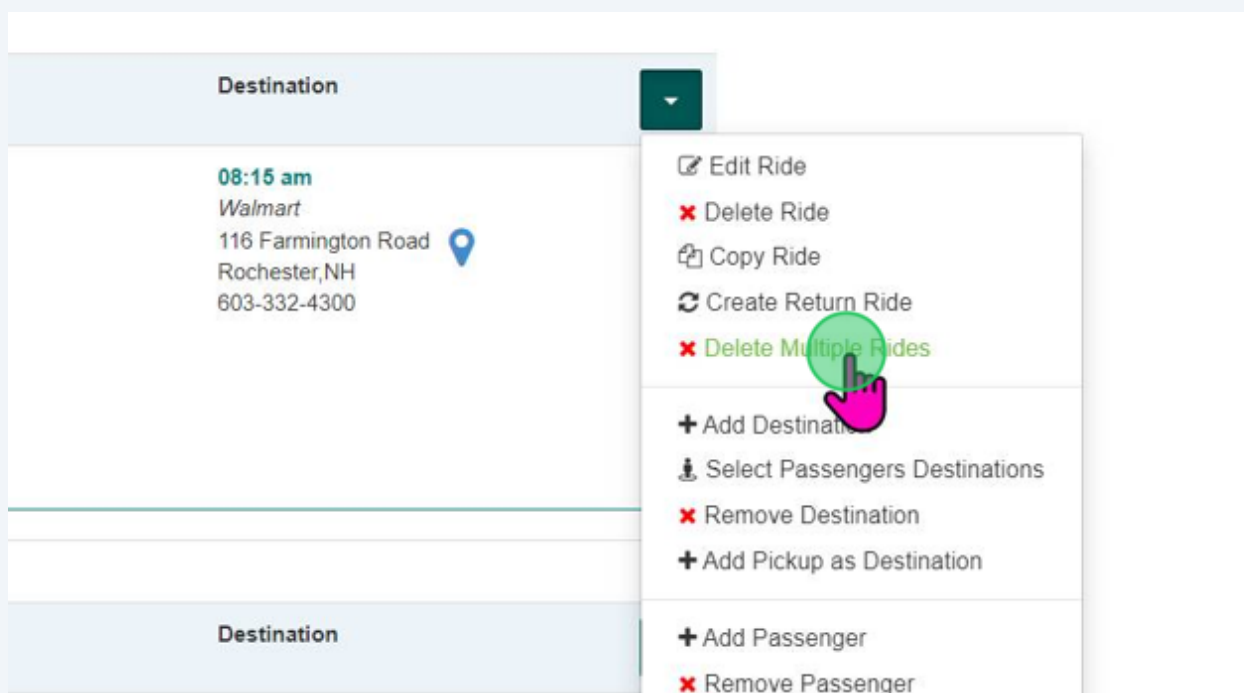
48 Switch over to Everyone Mode.



49 Click the drop down menu for any Ride



50 Click "Delete Multiple Rides" again.



51

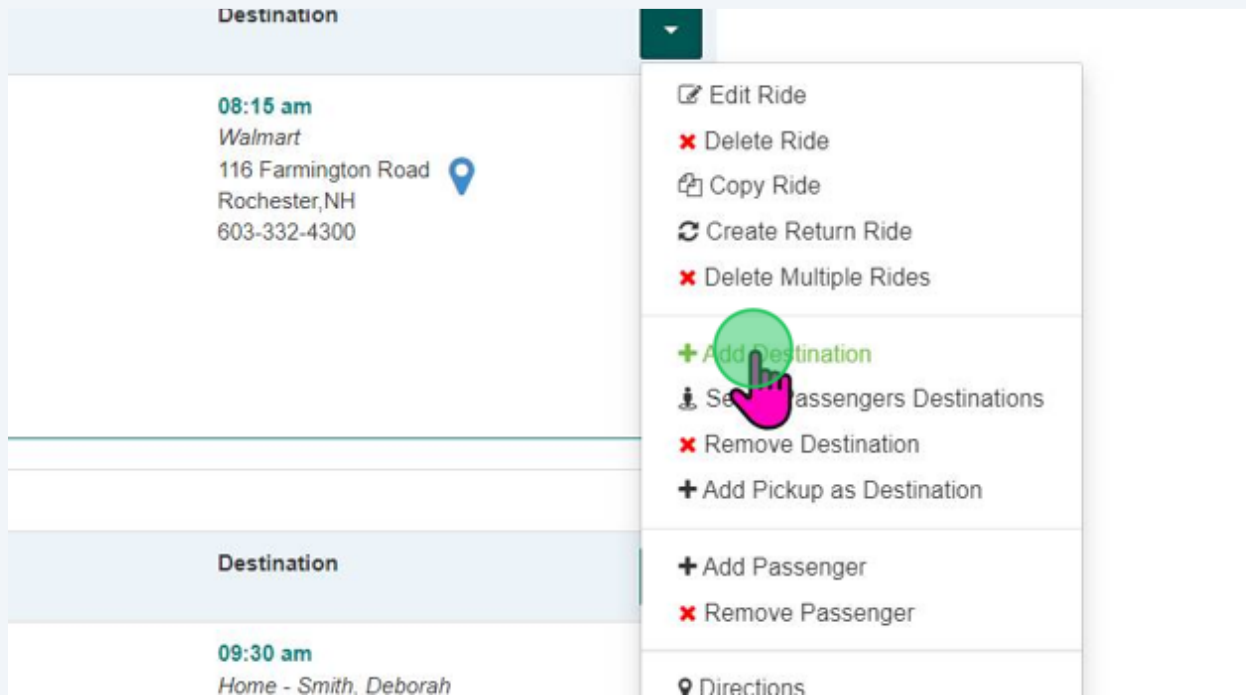
Here you'll notice we're deleting rides for everybody within this date range. Therefore it's very important to make sure you know which mode you are in and pay attention to the warning messages before you confirm.

The screenshot shows a software interface with a navigation bar at the top containing icons for People, Personnel, Events, Meals, Rides, and Equipment. The 'Rides' icon is highlighted. On the left, a sidebar shows 'The MSC North Center' and 'Scheduled Rides on 07/03/2023' with a count of 2. Below this, details for a ride are listed: Notes (Passenger has a walker), Vehicle (Bills Car), Driver (Amos Olds, Michele), Category (Non-Medical), and Subcategory (Shopping). The main area displays a 'Delete Multiple Rides' dialog box. A red warning banner reads: 'WARNING: This will delete all rides for all seniors within the specified date range.' Below the banner are 'From:' and 'To:' input fields. A calendar for June 2023 is shown, with the 1st, 2nd, and 3rd highlighted.

Add Destination

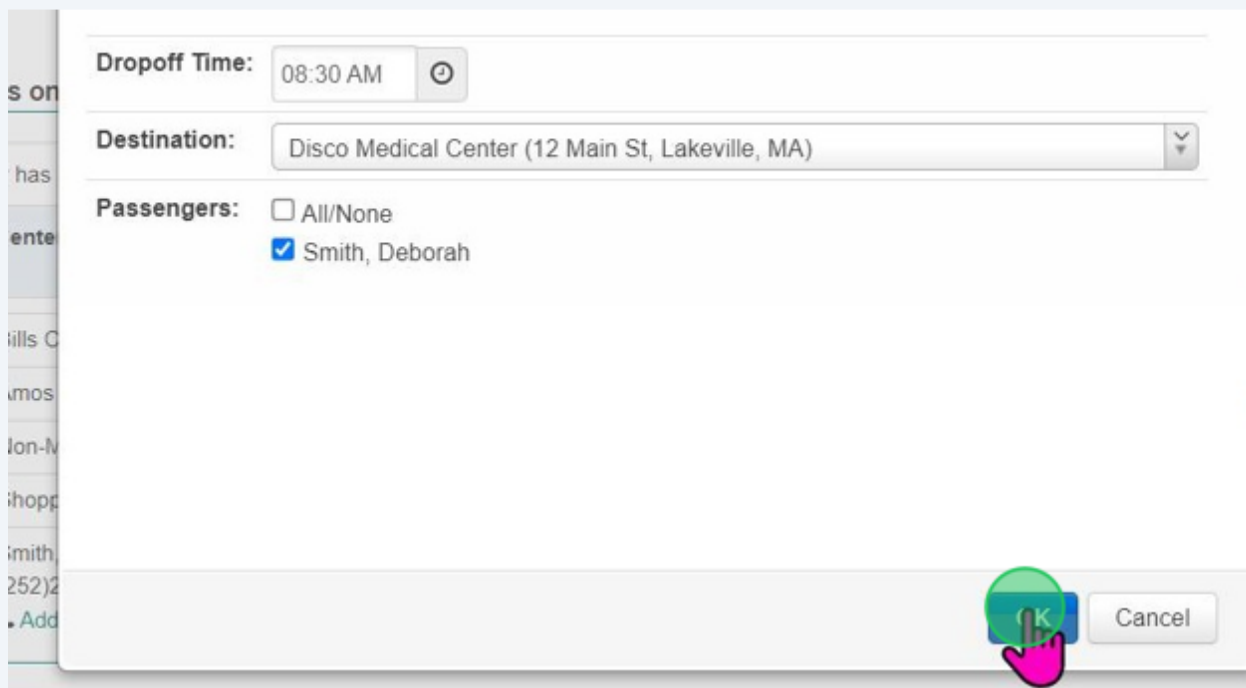
52

You can add multiple destinations to a ride as well. Click the drop down menu for any ride and click "Add Destination".

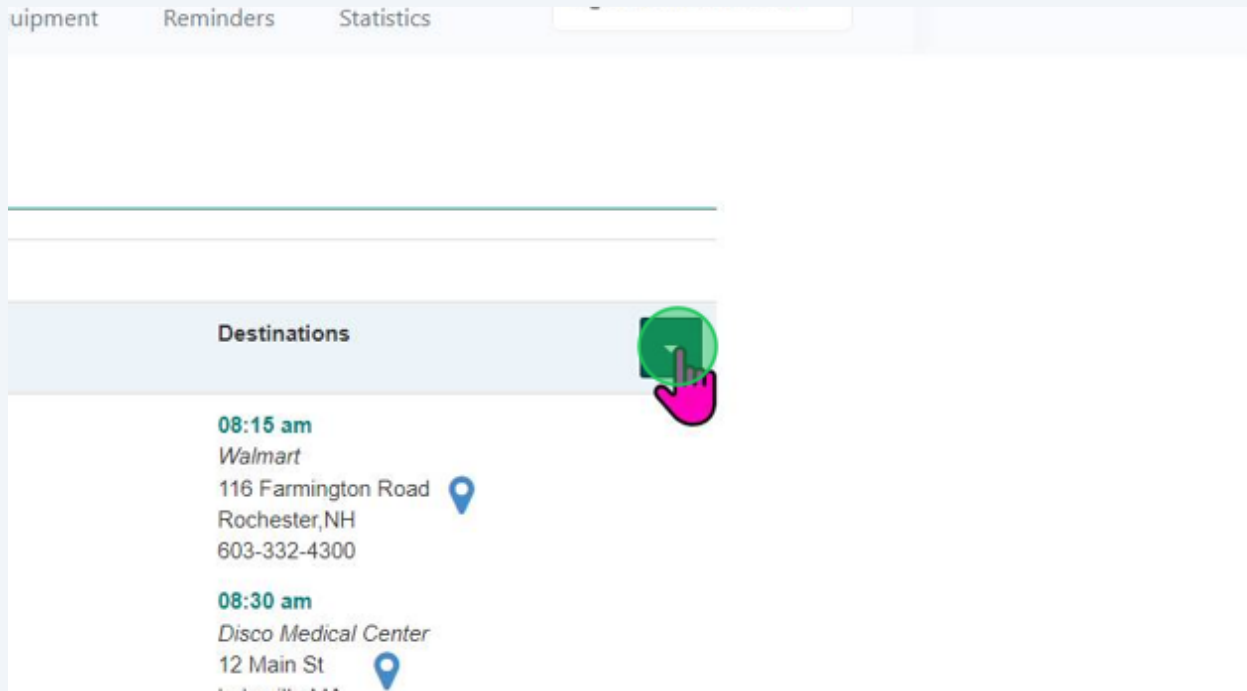


53

Here you'll see the destination selection window just like we did when we were creating the initial ride. Choose a time and a destination then click OK.

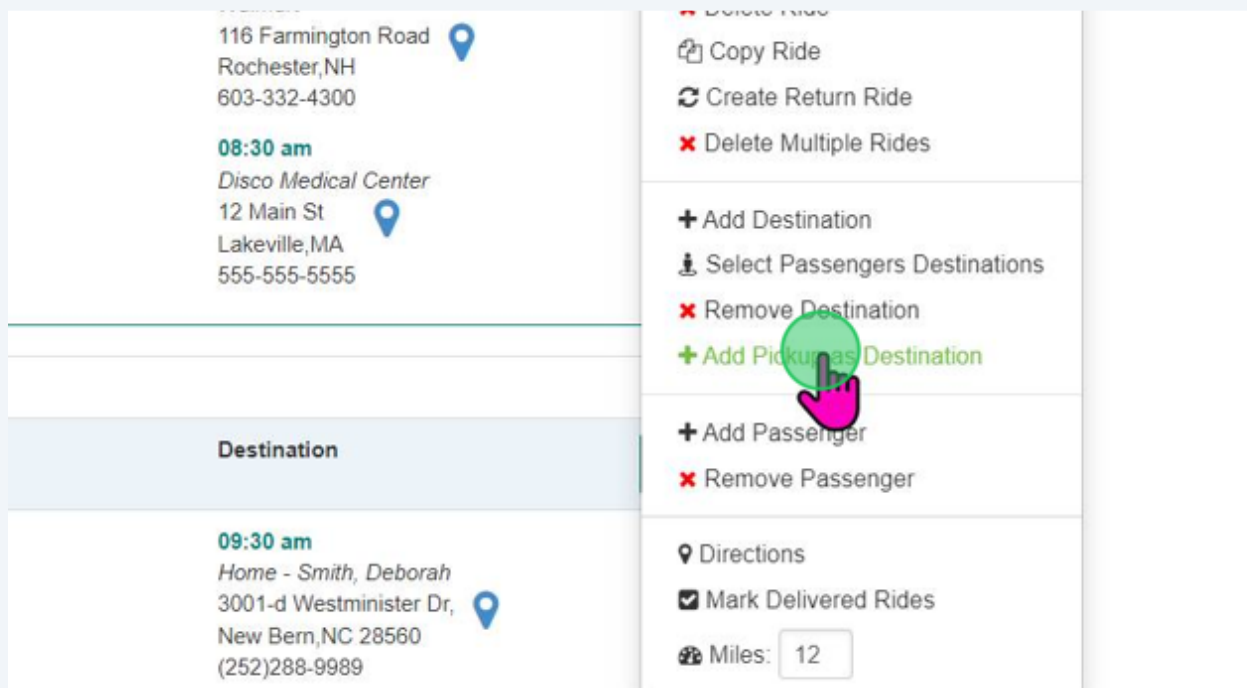


54 Now we can see that additional destination added to the ride.



Add Pickup as Destination

55 Click the drop down for any ride and click "Add Pick Up As Destination.".



56

This brings up the destination selection window again with the person's original pick up location selected automatically. Here you can choose the time and click OK and this will add that location as another destination in the ride.

Dropoff Time: 09:00 AM

Destination: h (3001-d Westminister Dr, , New Bern, NC)

Passengers: 09 : 00 AM

OK Cancel

57

Now we can see that additional destination

Getting Started Getting Started - S... DEMO SITE mytutorialcenter Work Email Barracuda

Equipment Reminders Statistics Bill Henderson

Destinations

- 08:15 am**
Walmart
116 Farmington Road
Rochester, NH
603-332-4300
- 08:30 am**
Disco Medical Center
12 Main St
Lakeville, MA
555-555-5555
- 09:00 am**
Home - Smith, Deborah
3001-d Westminister Dr,
New Bern, NC 28560
(252)288-9989

Add Passenger

58

You can add multiple passengers to a ride as well. Click the drop down menu for any ride and click "Add Passenger".

The screenshot displays a ride management interface. On the left, there are three ride entries, each with a time, a name, an address, and a phone number. The first entry is at 08:30 am, the second at 09:00 am, and the third at 09:30 am. A dropdown menu is open for the 09:00 am ride, listing several actions: Copy Ride, Create Return Ride, Delete Multiple Rides, Add Destination, Select Passengers Destinations, Remove Destination, Add Passenger (highlighted with a green circle and a hand cursor), and Remove Passenger. Below the menu, there are options for Directions, Mark Delivered Rides, and Miles (12).

110 Farmington Road
Rochester, NH
603-332-4300

08:30 am
Disco Medical Center
12 Main St
Lakeville, MA
555-555-5555

09:00 am
Home - Smith, Deborah
3001-d Westminister Dr,
New Bern, NC 28560
(252)288-9989

09:30 am

Destination

- Copy Ride
- Create Return Ride
- Delete Multiple Rides
- + Add Destination
- Select Passengers Destinations
- Remove Destination
- + Add Passenger
- Remove Passenger

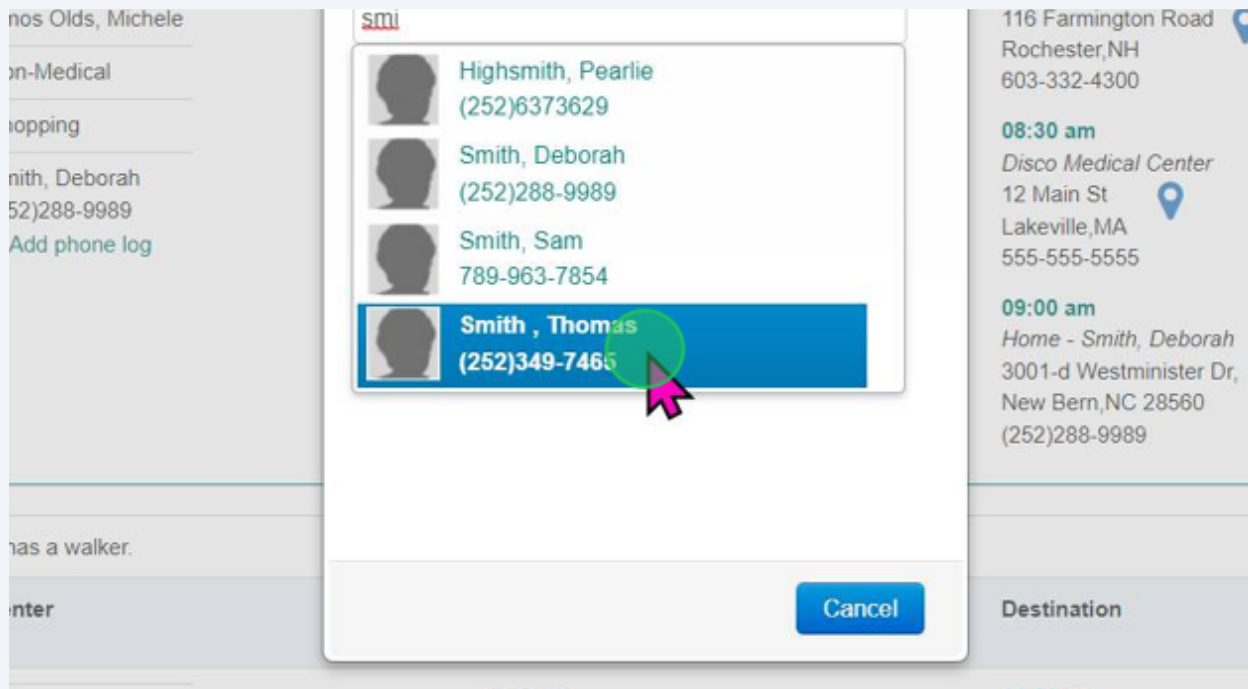
Directions

Mark Delivered Rides

Miles: 12

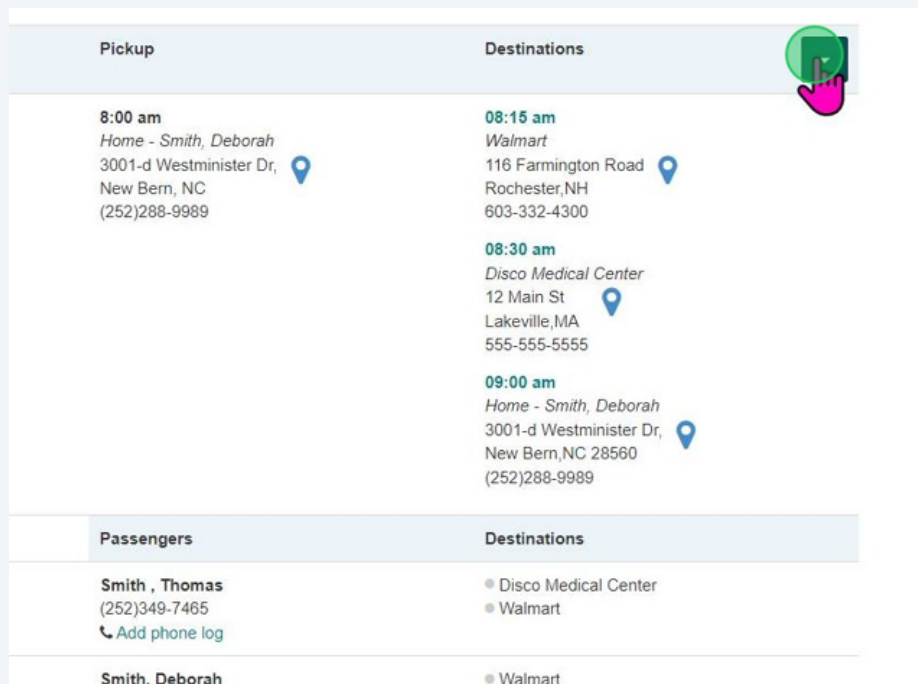
59

Start typing in the search box and you'll get a drop down list of anybody that matches what you've typed so far. Click on the person to select them as a passenger.



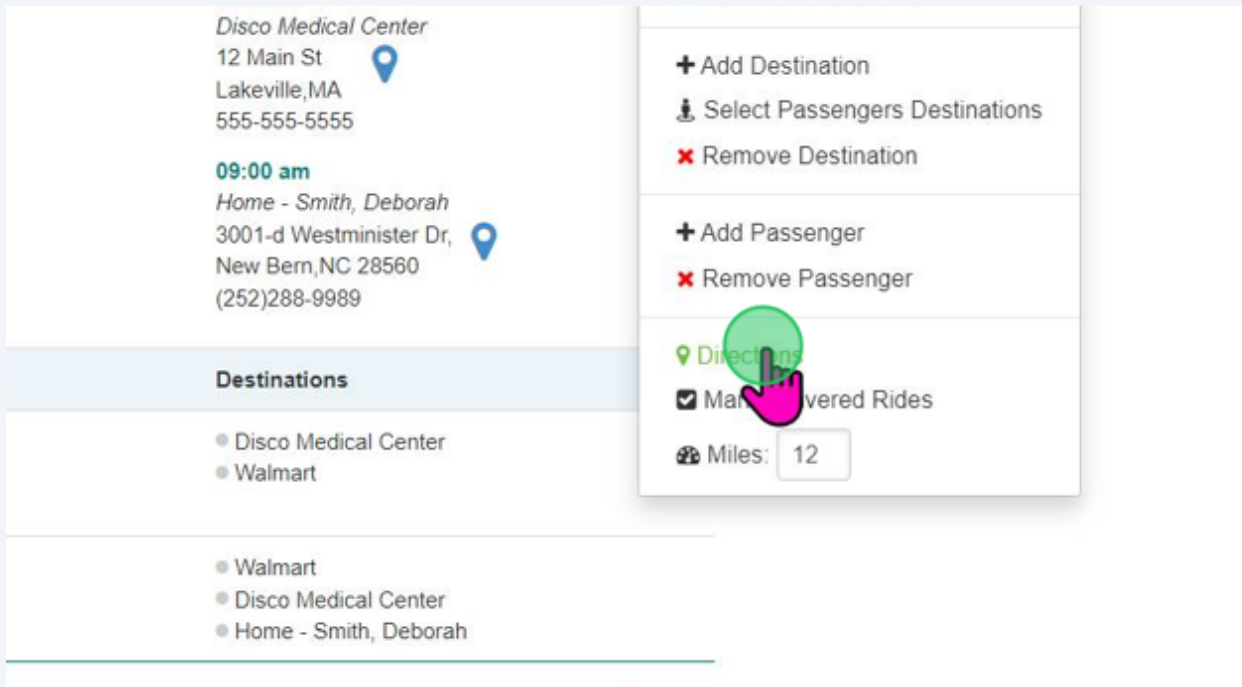
60

Now we can see that person added to the passengers list.

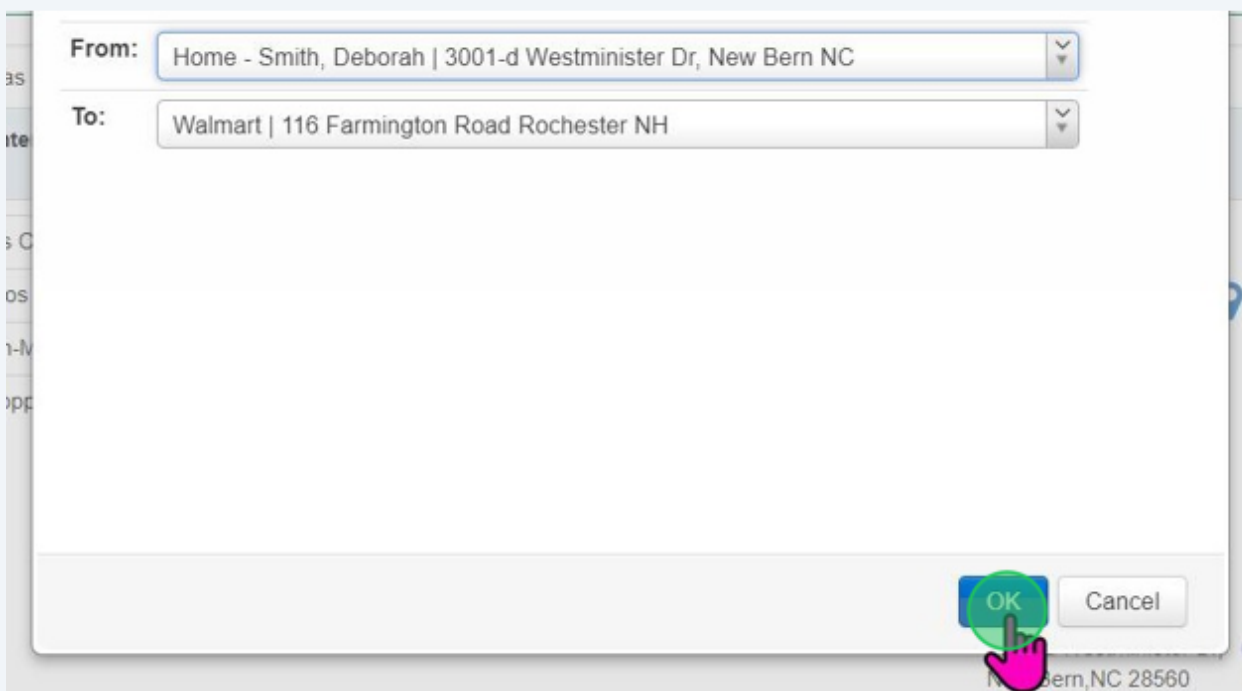


Directions

61 You can also easily get directions and mileage. Click on the drop down menu for any ride and click directions.

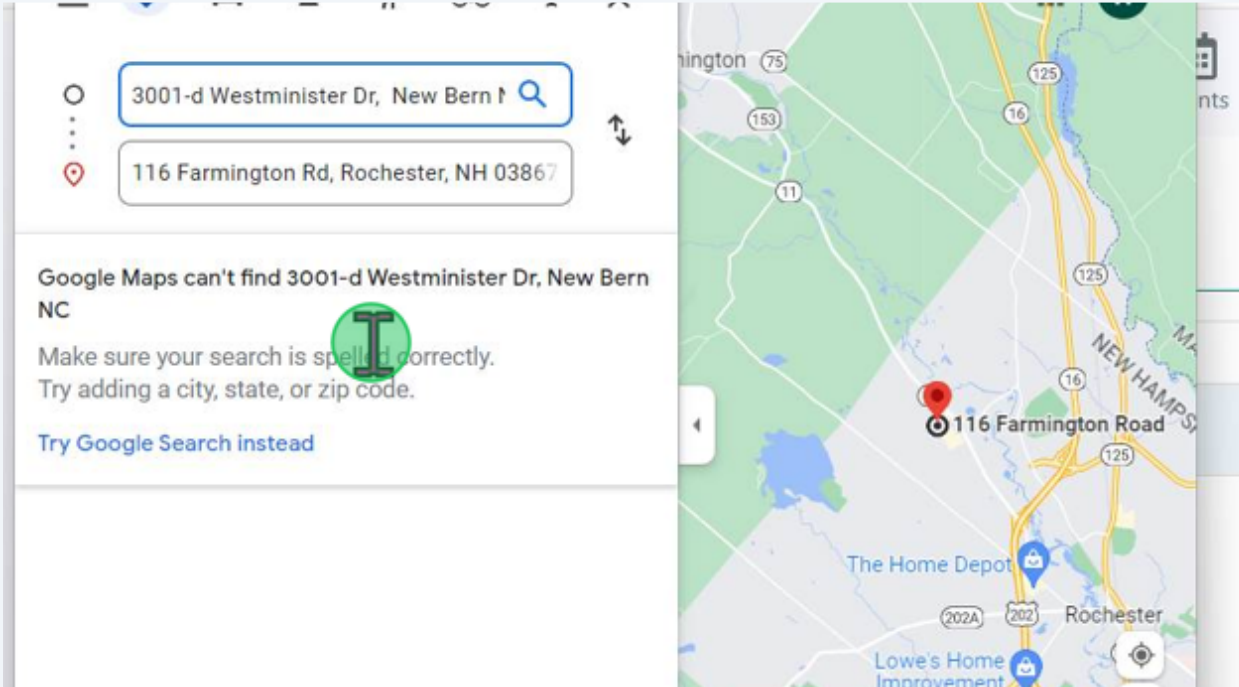


62 Here you'll confirm your two locations in click OK.



63

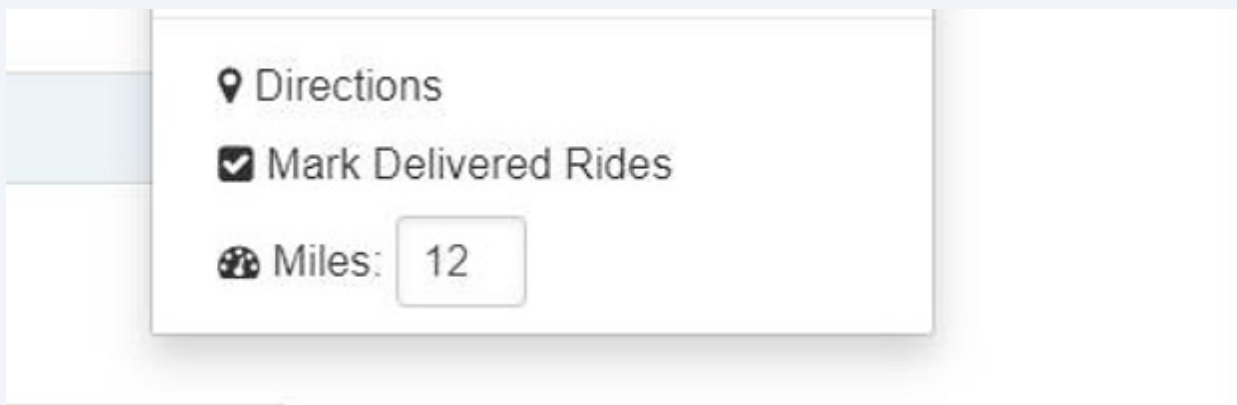
Google maps will pop up on the screen with those two locations pre-entered and you can see your turn by turn instructions along with mileage and of course you can print those directions out if you'd like as well as share them in different ways.



Mark Rides Delivered and Miles

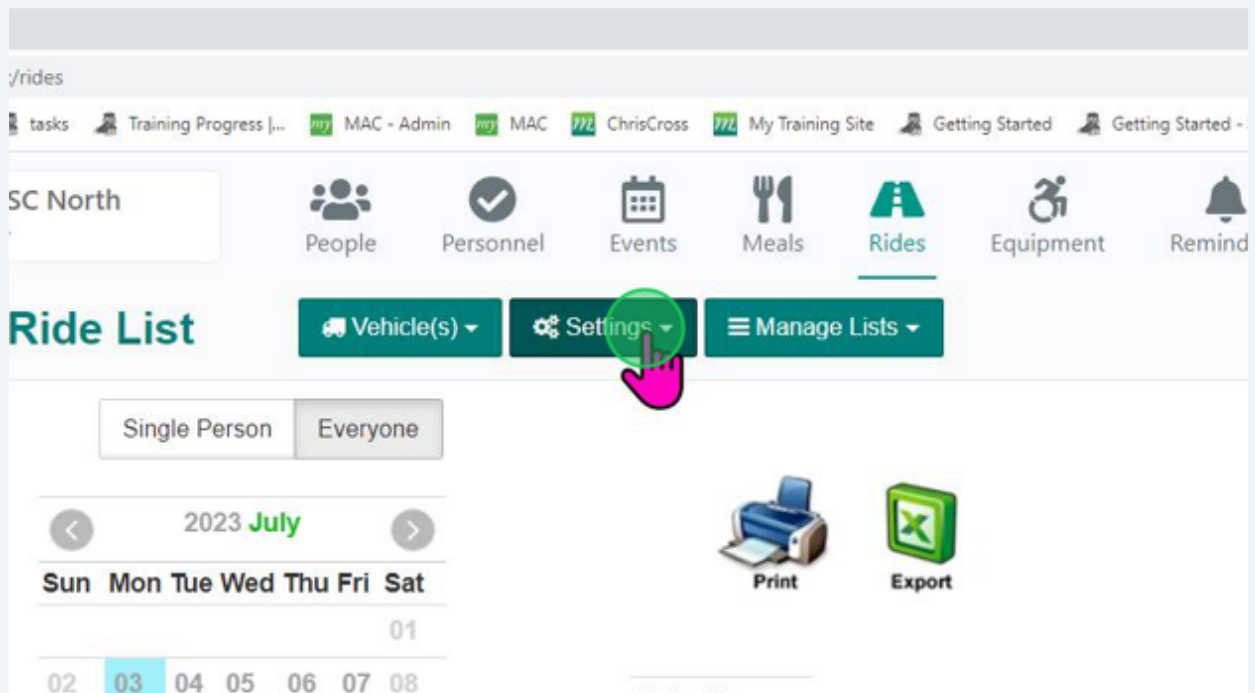
64

Click back on the drop down menu for any ride. The last two fields are "Marked Delivered Rides" and "Miles". The Miles field is simply another place to enter those miles without having to go edit the ride. There is no save button, simply enter a number and that number will stick. Unchecking "Mark Delivered Rides" is indicating that this ride did not happen.



Printing Driver Sheets

65 Click the settings drop down.



66

Here you can choose what exactly you'd like to have displayed on the driver's sheet and you can choose how you want the driver's sheets sorted. It's important to remember if you are having page breaks between drivers you'll want to sort by drivers or you will end up with a lot of extra pages.

Font Size: 12

Print pagebreaks when Van/Driver changes

Display on Printed Sheet

Vehicle

Driver

Pickup

Category

SubCategory

Disabilities

Sponsor

Passenger Phone

Sort By

Vehicle

Driver

Pickup Time

67

Click "Print"

Navigation icons: People, Personnel, Events, Meals, Rides, Equipment, Reminders, Stati

st Vehicle(s) Settings Manage Lists

Single Person Everyone

2023 July

Tue	Wed	Thu	Fri	Sat
				01
04	05 2	06	07	08
11	12 2	13	14	15

Print Export

Order By: Driver

Vehicle(s): All

68

Here we have the driver's sheet. Everything at the top is meant for the driver to fill in if you want them to. Remember you can always go back to the settings drop down and customize what's displayed on this sheet.

Printed on 06/23/2023 Page 1 of 1

myseniorcenter
by senior centers, for senior centers

Start Mileage: _____ Start Time: _____
 End Mileage: _____ End Time: _____
 Gallons of Fuel: _____ Total Hours: _____

Bills Car **Amos Olds, Michele** **Mon - Jul 03, 2023**

Non-Medical / Shopping Passenger has a walker.

Senior Center

Pickup	Destination	Passengers
8:00 am	08:15 am	Smith , Thomas
Home - Smith, Deborah	Walmart	(252) 349-7465
3001-d Westminister Dr,	116 Farmington Road	
New Bern, NC	Rochester, NH	Smith, Deborah
(252) 288-9989	(603) 332-4300	(252) 288-9989
	08:30 am	
	Disco Medical Center	
	12 Main St	
	Lakeville, MA	
	(555) 555-5555	
	09:00 am	
	Home - Smith, Deborah	
	3001-d Westminister Dr,	
	New Bern, NC	
	(252) 288-9989	

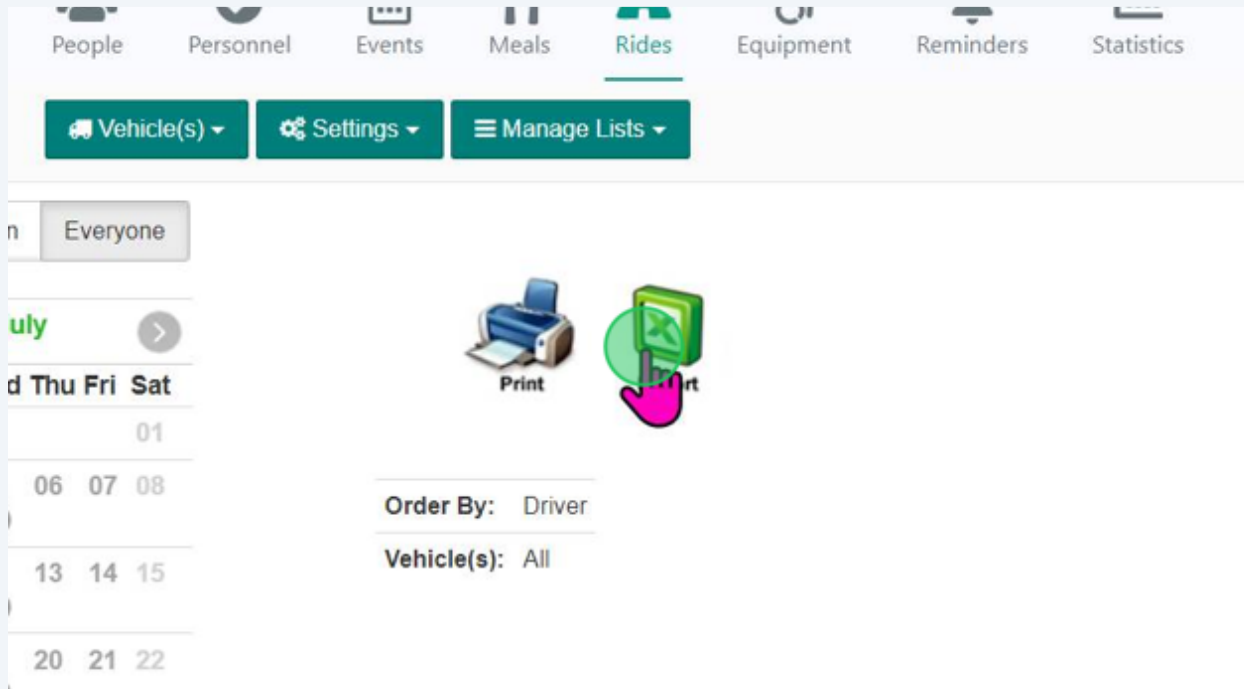
Non-Medical / Shopping Passenger has a walker.

Senior Center

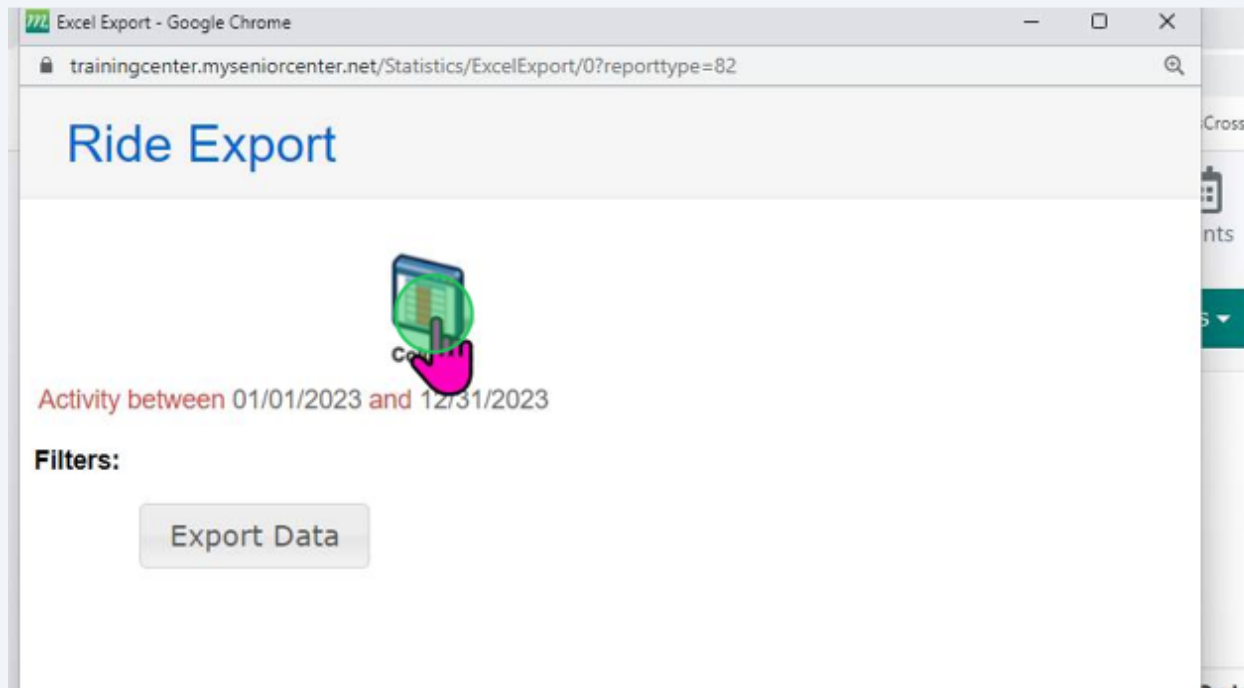
Pickup	Destination	Passengers
--------	-------------	------------

Exporting Rides to Excel

69 You can also export your rides to an excel sheet. Click Export.

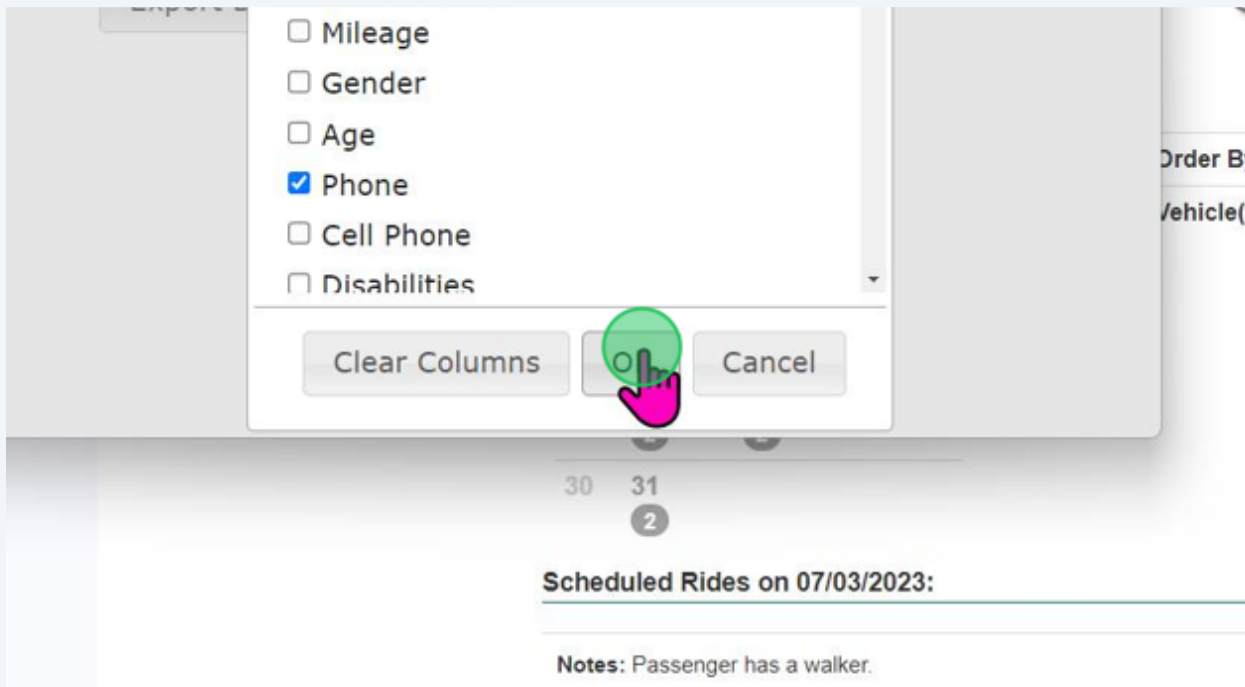


70 You can customize the excel sheet by clicking on Columns.



71

Here you can choose from their file info fields and their custom fields to customize your exported excel sheet. The fields you choose will be columns in the excel sheet.

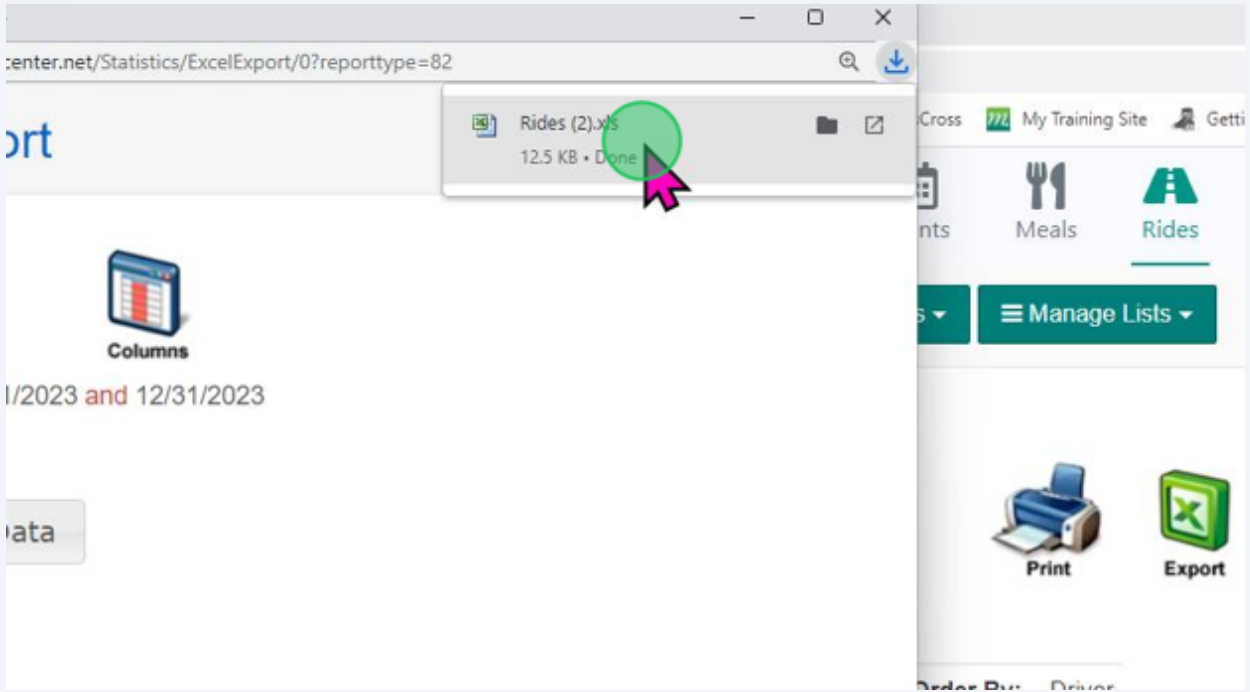


72

Click "Export Data"



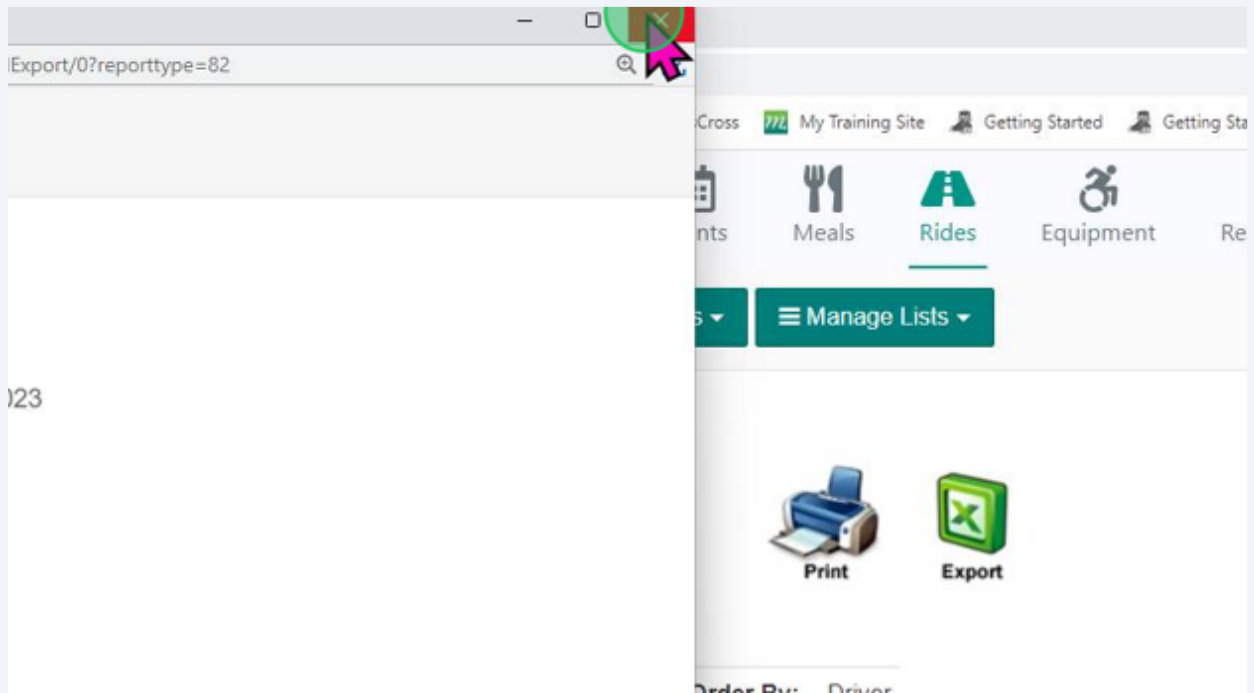
73 The excel sheet will be downloaded to your computer.



74 Once you have your excel sheet open you can do whatever you like with it at that point.

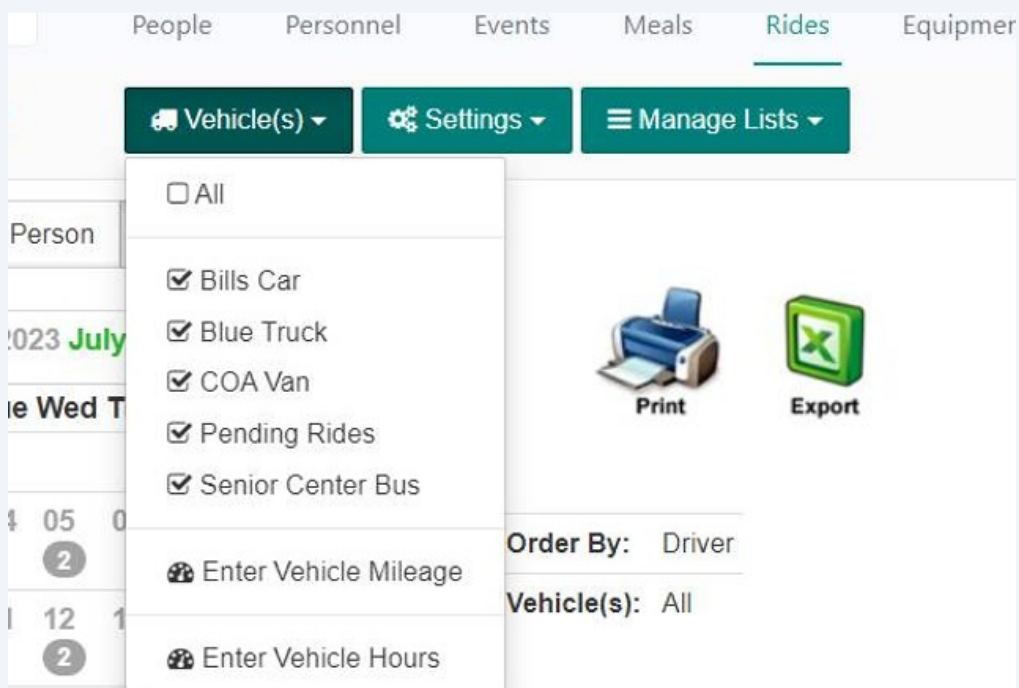
Amos Old: Non-Medic Shopping	07/10/2023	Smith, Del (252) 288-5	9:15 am	Walmart	116 Farmir Rochester (603) 332-09:30 an
Amos Old: Non-Medic Shopping	07/17/2023	Smith, Del (252) 288-5	8:00 am	Home - Sn3001-d WeNew Bern, (252) 288-5	08:15 an
Amos Old: Non-Medic Shopping	07/17/2023	Smith, Del (252) 288-5	9:15 am	Walmart	116 Farmir Rochester (603) 332-09:30 an
Amos Old: Non-Medic Shopping	07/24/2023	Smith, Del (252) 288-5	8:00 am	Home - Sn3001-d WeNew Bern, (252) 288-5	08:15 an
Amos Old: Non-Medic Shopping	07/24/2023	Smith, Del (252) 288-5	9:15 am	Walmart	116 Farmir Rochester (603) 332-09:30 an
Amos Old: Non-Medic Shopping	07/31/2023	Smith, Del (252) 288-5	8:00 am	Home - Sn3001-d WeNew Bern, (252) 288-5	08:15 an
Amos Old: Non-Medic Shopping	07/31/2023	Smith, Del (252) 288-5	9:15 am	Walmart	116 Farmir Rochester (603) 332-09:30 an

75 Click "Close"



Customizing the Calendar View

76 If you click on the vehicles drop down you can customize the calendar view and choose which vehicles you want to see rides for.

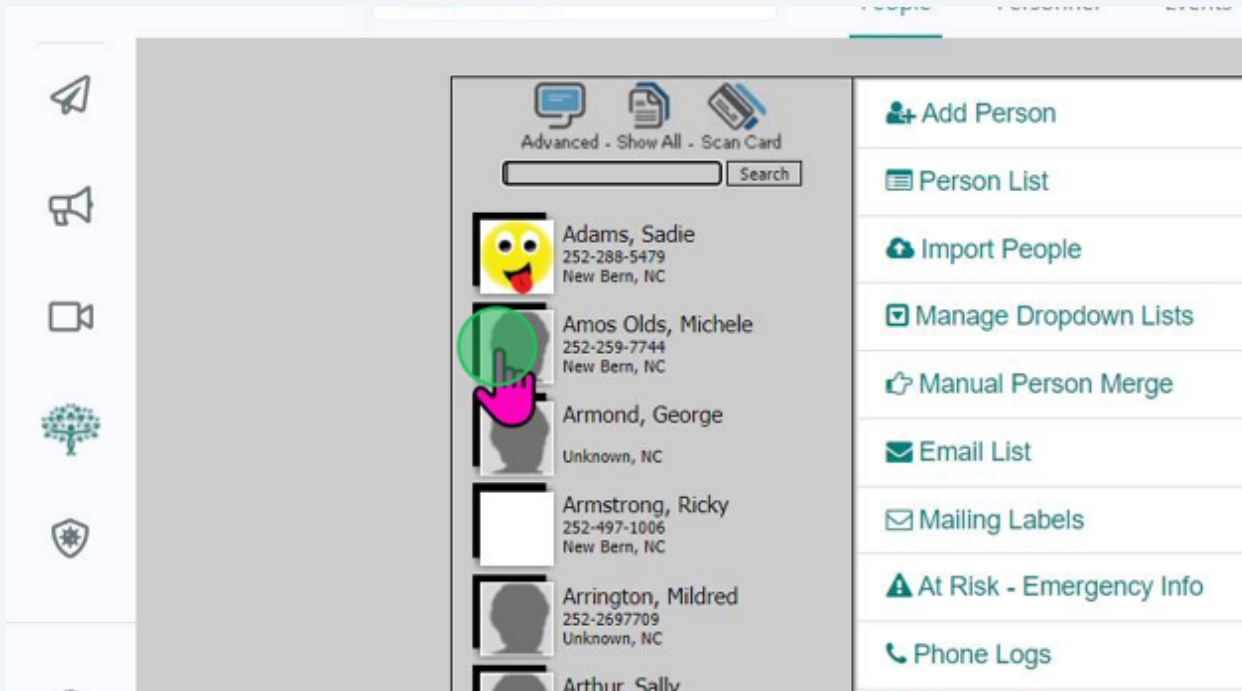


Things you can do from the People Tab

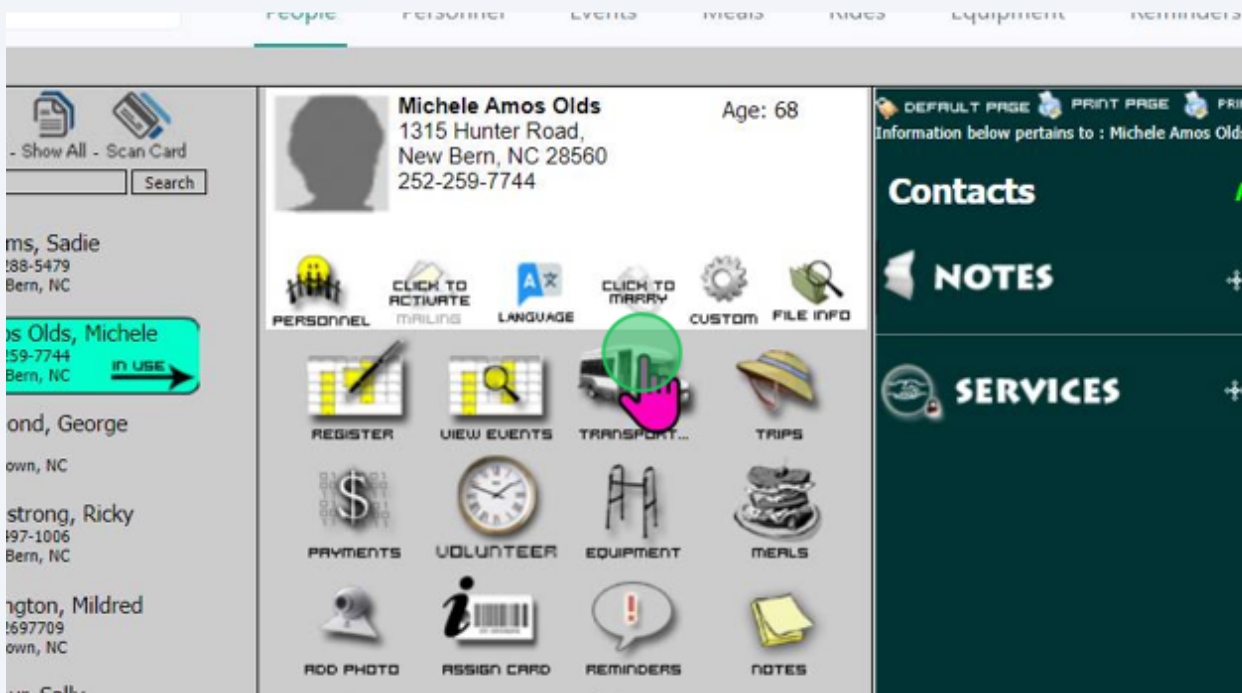
77 Go to the People tab.

The screenshot shows a web browser window with the URL `igcenter.myseniorcenter.net/msc/rides`. The browser's address bar and tabs are visible at the top. The main content area features a header for 'The MSC North Center' and a navigation bar with icons for 'People', 'Personnel', 'Events', 'Meals', and 'Rides'. A pink hand cursor is pointing to the 'People' icon. Below the navigation bar, there is a 'Ride List' section with buttons for 'Vehicle(s)', 'Settings', and 'Manage Lists'. A filter section below these buttons has 'Single Person' and 'Everyone' options. A calendar for July 2023 is displayed, with the 3rd highlighted. To the right of the calendar are 'Print' and 'Export' icons.

78 Select a person.



79 Click that person's Transportation icon.



80

Here you'll be able to see that person's rides and perform some of the actions that you can from the rides tab but not everything can be done from here.

My Training Site Getting Started Getting Started - S... DEMO SITE mytutorialcenter Work Email Barracuda Network

Meals Rides Equipment Reminders Statistics Bill Henderson

Age: 99

+ Add Ride Compact View

2023 June

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

81

You can add a ride from here. Click " Add Ride"

C - Admin MAC ChrisCross My Training Site Getting Started Getting Started - S... DEMO SITE mytutorialcenter

Personnel Events Meals Rides Equipment Reminders Statistics

Sadie L Adams Age: 99
1826 Clark Ave,
New Bern, NC 28540
252-288-5479

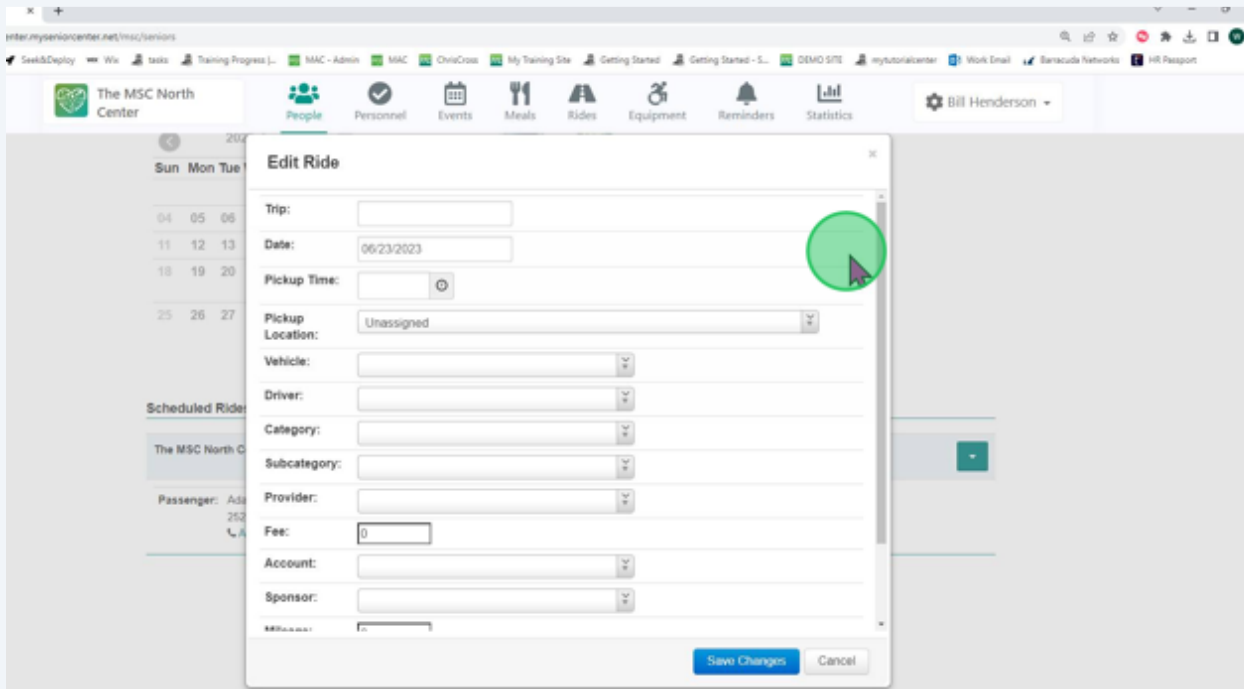
+ Add Ride Compact View

2023 June

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17

82

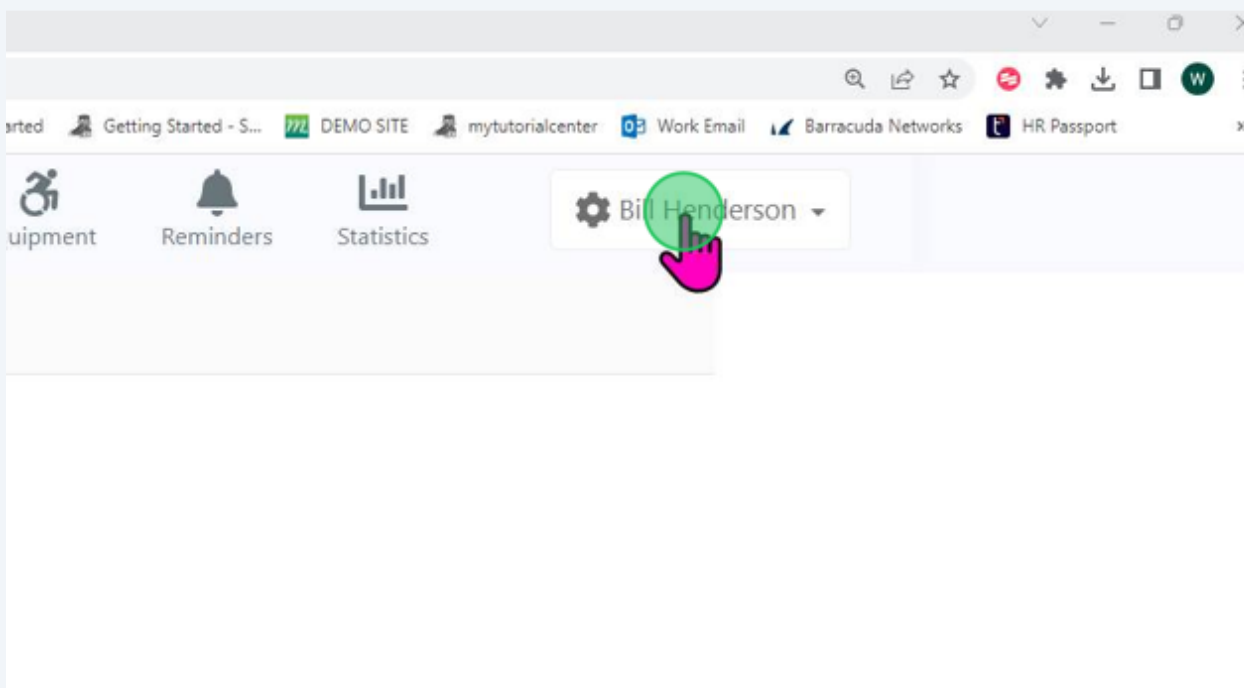
Clicking add ride shoot you over to the rides tab and everything else is exactly the same after that.



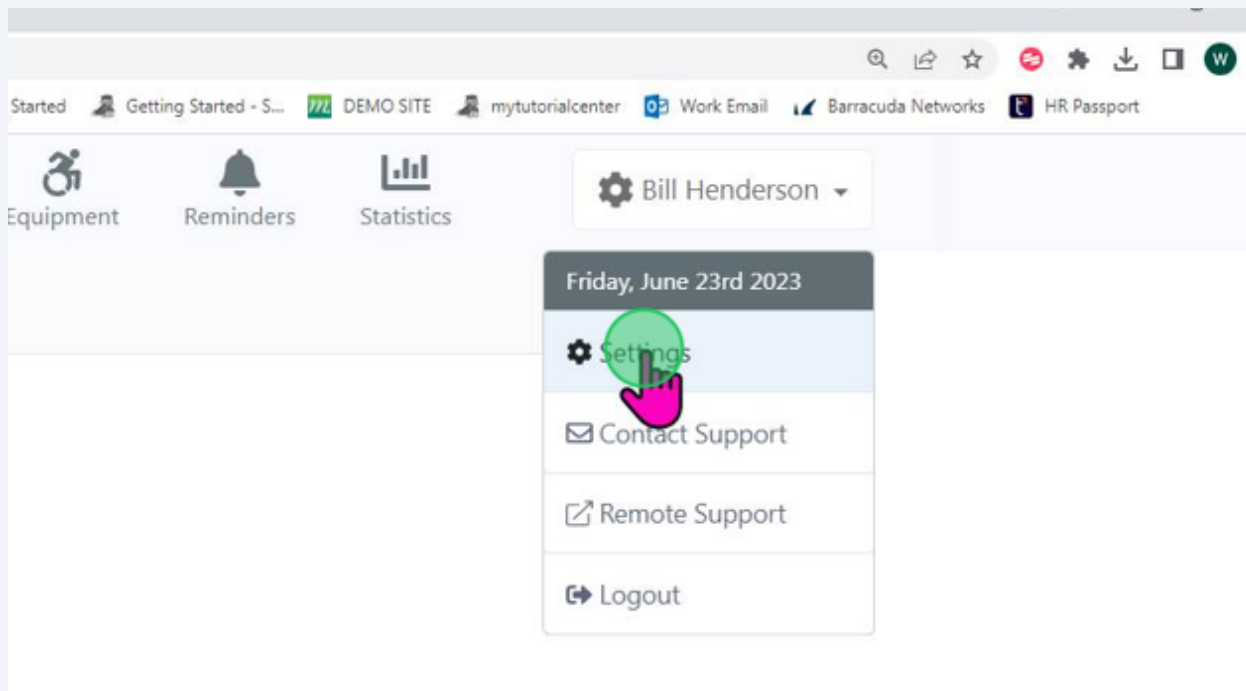
Preference Settings

83

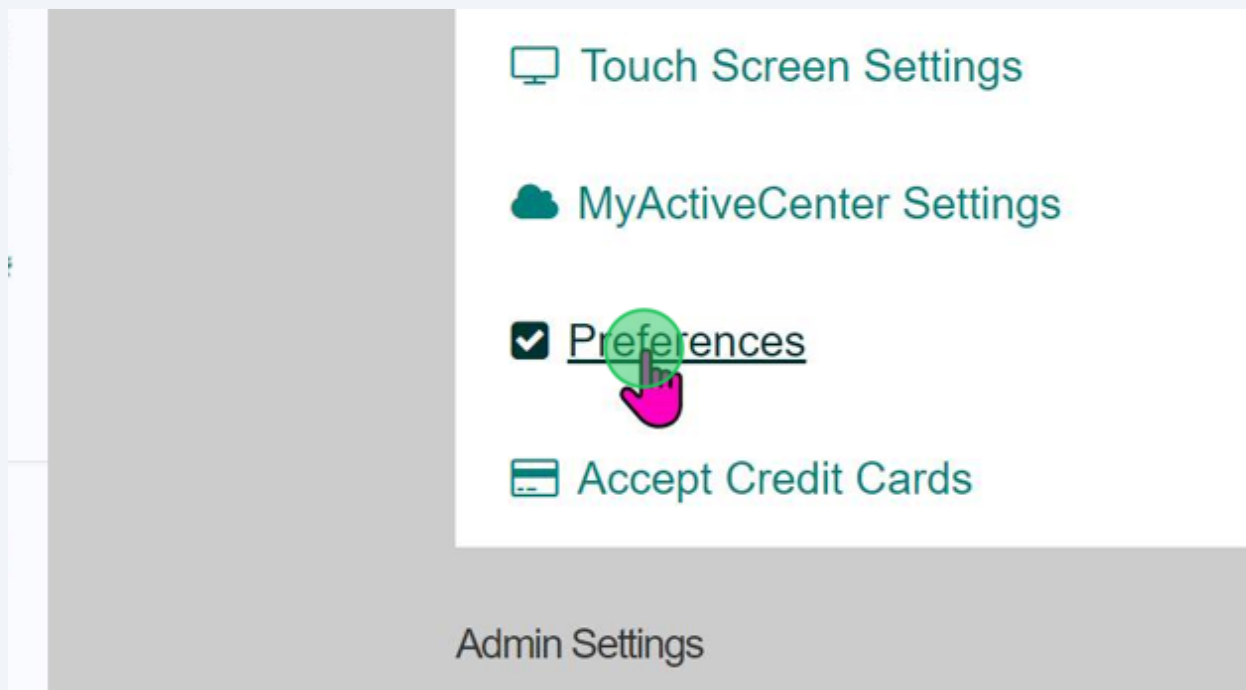
Click your name in the upper right hand corner of the screen.



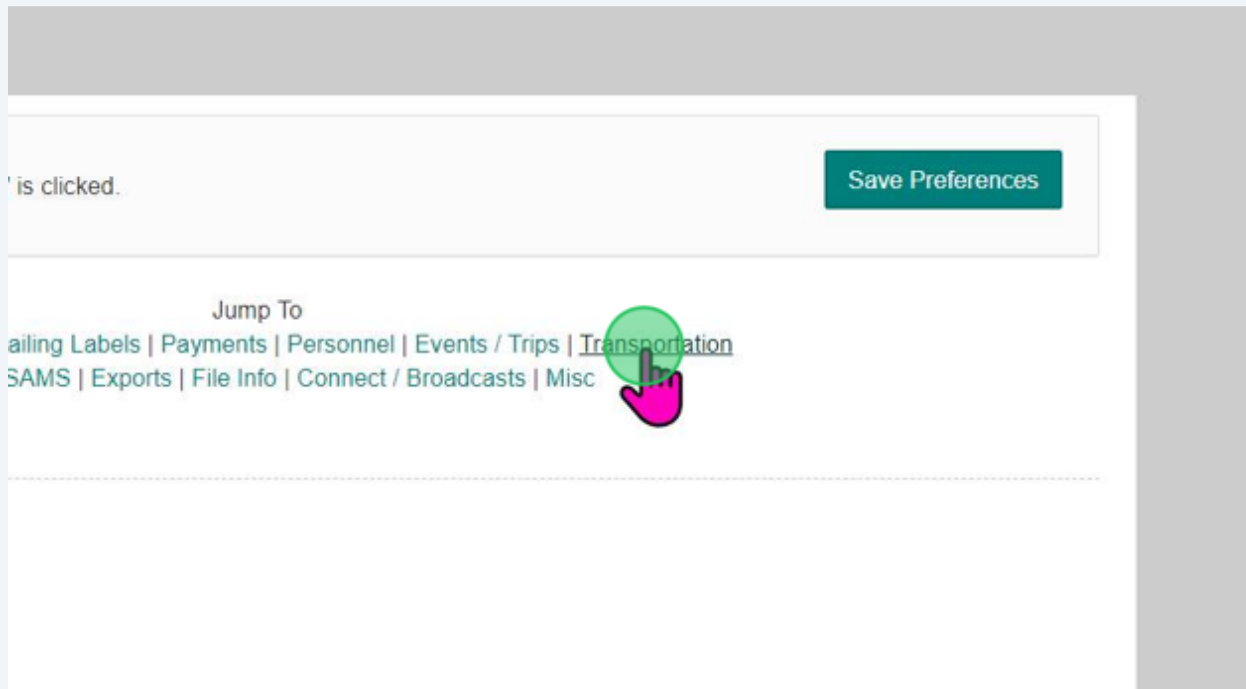
84 Click settings.



85 Click "Preferences"



86 Click the transportation link to jump to the transportation section.



87 Here you'll see the different preferences available.

