

# Vanpool Regional Administration

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## Introduction

This document provides administrators a reference point as to how to perform vanpool related administration functions using the SmartRideshare system. This document assumes administrators are familiar with basic administration roles, user and administration functionality, the concept of networks and the general capabilities of the system. Reviewers are encouraged to review the manual alongside the product to get the maximum value from this document. It is not a goal of this document to clarify business processes for agencies. Similarly, it is not a goal of this document to exhaustively document every field and every label or message in the context of vanpool administration. To access the vanpool administration functionality, you need to be a regional administrator.

## Structure and Layout

- Structure

This user manual goes over the functions provided to regional agency administrators to manage vanpool programs. The manual is grouped under sections based on functions and reference screens are provided where applicable.

- Navigation

Bread crumbs are provided as a quick reference mechanism to navigate to the appropriate screen. Menu items are shown with a blue background. Links and buttons are shown with an orange background. For example, the image below describes the menu item “Vanpool” and the link “Add New Van to Fleet” which can be found on the page shown by the Vanpool menu option.



- Screen shots

Where applicable, screen shots are provided along with narrative text and callouts.

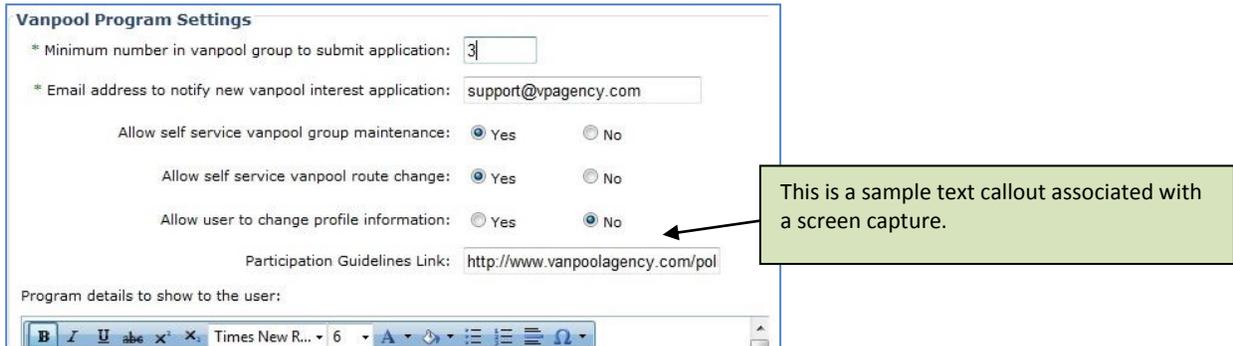


Figure - Sample screen shot

- Best practices

Throughout the manual, best practices are identified and marked with a blue colored callout. A sample best practices callout is posted below.

**BEST PRACTICE** – This is a sample best practices note.

## Make sure you are in the right application

Multiple administration applications are designed with the familiar look and feel of the ride matching website so administrators can apply their know-how of one application to navigate easily through the other applications. To make sure you are managing the right application for your vanpool program:

1. Check that the heading above the menu is for your regional network
2. Look for the vanpool menu in the menu bar



Figure – Check to make sure you are in the right administration application

## Vanpool Program Configuration

You can configure multiple elements of your agency's vanpool program through the administration application. To view your current program configuration, Go to the **Vanpool** menu and click on the link "View/Modify Vanpool Program Settings".

### Decide the Minimum # for a Vanpool Interest Group

Your agency will want to decide how many people will need to link together in order to send in a vanpool interest group. Commuters can still get started without this step by contacting your agency directly. It is recommended that your agency chooses 2 or more for this number, so that you are not receiving vanpool interest applications from individuals who are just looking for a ride match.

### Choose the email address for Vanpool Interest Group notifications

You will want to choose an email address that is checked on a regular basis within your agency. Anytime a user submits a vanpool interest application, the email will go to this email address.

### Allow self service vanpool group maintenance

If this option is set to "Yes", then the driver is able to: remove passengers from the van, assign pickup and drop-off locations to the passengers in the van and change roles of those in the vanpool. The primary driver role cannot be changed through the self-service option – an administrator must explicitly change a primary driver.

### Allow self service vanpool route change

If this option is set to "Yes", then the driver is able to: view the route of the van along with all stop information, change the order of the stops and add or remove stops.

### Allow user to change profile information

If this option is set to "Yes", the vanpool user can change the first name, last name, phone number, email address, home address, work address and mailing address on file. If the option is set to 'No', only administrators can edit this information on file via proxy access.

### Participation guidelines link

Optionally, the vanpool administrator can provide a link to the vanpool program and policy. The vanpool interest group driver can see this link before submitting the vanpool application.



## Lookup

Vans can be looked up by Van Unit #, Vanpool ID or Legacy Vanpool ID. The Van Unit # is the van number of the van itself, often called the High Occupancy Vehicle (HOV) number. The Vanpool ID is a unique system generated identifier that uniquely identifies a vanpool across all agencies in the system. The Legacy Vanpool ID is carried forward from external systems. The Legacy Vanpool ID is also a unique identifier which identifies a vanpool across all agencies in the system.

Vanpool

**Look up a Vehicle/Vanpool using Van Unit #**

Van Unit #:

Enter the Van Number that you wish to look up.

[Get Van Details](#)

**Look up a Vehicle/Vanpool using Vanpool ID**

Vanpool ID:

Enter the Vanpool ID that you wish to look up.

[Get Vanpool Details](#)

**Look up a Vehicle/Vanpool using Legacy Vanpool ID**

Legacy Vanpool ID:

Enter the Legacy Vanpool ID that you wish to look up.

[Get Vanpool Details](#)

When a lookup is performed for a vanpool which belongs to the agency you are managing – **vanpool management** links are available so you can manage the vanpool as well. When a lookup is performed for a vanpool of another agency, the information is available – however no vanpool management links are available. This design is intentional.

Figure – Vanpool look up capability

Vanpool

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Get Vanpool Details

<b>Van Details</b>		<a href="#">Edit Vehicle Details</a> <a href="#">Record Odometer Reading</a> <a href="#">Change Van Unit</a> <a href="#">Terminate Vanpool</a> <a href="#">Manage Vanpool Details</a> <a href="#">Manage Vanpool Route</a> <a href="#">Add Passenger</a>
Van Number: 456	Vehicle Make: Toyota	
Model: Siena	Last Odometer: 4/3/2011	
Seating Capacity: 8	Seating Available: 1	
Van Status: Operating Vanpool	Agency: Community Transit	
Legacy Vanpool ID: 2010456	Vanpool ID: 2701	
Trip Code: 73565		
<b>Vanpool Primary Contact Details</b>		<a href="#">Edit Contact Details</a>
First Name: John	Last Name: Smith	
Email: demo8@icarpool.com	Phone: 4253245432	
<b>Vanpool Details</b>		
Name: <a href="#">Bob Lee</a>		Email: demo27@icarpool.com
Start Date: 7/26/2011		Phone: 2065431254
Role: Primary Driver		
Pickup At: Vanpool Origin	Dropoff At: Vanpool Destination	
Name: <a href="#">Pjar Ackerman</a>		Email: demo13@icarpool.com
Start Date: 7/26/2011		Phone: 508-555-8132
Role: Passenger		<a href="#">Remove Passenger</a>
Pickup At: Lynnwood Transit Center	Dropoff At: Vanpool Destination	
Name: <a href="#">Jane Mathew</a>		Email: jane.icarpool@gmail.com
Start Date: 7/26/2011		Phone: 425-265-1243
Role: Bookkeeper, Passenger		<a href="#">Mark as Primary Driver</a>

When a user finds this vanpool as a match and sends a rideshare request, the primary contact and the driver will receive the email.

Figure – Vanpool look up results and ability to manage vanpools belonging to the agency

**BEST PRACTICE** – Anytime you are going to add a vanpool, you should first use the lookup feature to avoid creating duplicate records.

## Adding a new van

If a van does not exist in the system, the van must be added before it can be assigned to vanpools. To add a new van, go to the **vanpool** menu and click on the link “Add New Van to Fleet”. If your agency does not lease vans – you may enter 0 as the lease cost. The only required fields are the Van Number and the Vehicle Provider. If the rest of the fields are blank – the system will default the values to match the values set during data migration.

The screenshot shows a web interface with two main buttons at the top: a blue button labeled 'Vanpool' and an orange button labeled 'Add New Van to Fleet'. A blue arrow points from the 'Vanpool' button to the 'Add New Van to Fleet' button. Below the buttons is a form titled 'Enter Van Details'. The form contains the following fields:

- \*Van Number: 4332
- Vehicle Make: Toyota
- Model: Siena
- Year: 2007
- Fuel Type: Gasoline (dropdown menu)
- \*Vehicle Provider: Regional Agency (dropdown menu)
- Lease Cost: 1200 \$
- Date Acquired: 03/15/2010
- Seating capacity: 8
- # of Bike Rack Slots: 2
- Vehicle Type: Bench (dropdown menu)
- Notes: (empty text area)
- Accessibility Description: This van supports one wheel-chair passenger. (text area)
- At the bottom of the form is a button labeled 'Add Van Details'.

Figure – Adding a new van to the system

## Adding a new vanpool (single driver)

The steps listed below describe the overall process for adding a new vanpool to the system. In some cases, the steps may slightly differ. Some users may have already completed some of the steps. For example the driver may have already signed up on the ride matching website and created a trip – if this is the case then there may not be a need to create a new account and/or a new trip.

### 1. User account for driver

Check if the user account for the driver already exists. You can check if the account exists by using the various options available under the “Users” menu. You can perform a look up using email address, partial name or partial screen name. If the account does not exist, create a new account.

### 2. Home, work and mailing address for the driver

Proxy into the driver’s account and check if the account has the Home, Work and Mailing addresses configured. You can review the addresses under the **Profile** menu by selecting “My Locations”. If the account does not have all of the addresses configured, add them to the profile.

### 3. Ensure agency network is in the user’s profile

Select the **Profile** menu and then “My Networks.” This will show networks based on home and work associations. Please note – if you do not see your agency network, the user’s vanpool request cannot be serviced by your agency. Agency vanpool programs provide a van to users who either live

or work in their jurisdiction. If the user neither lives nor works in the region serviced by your agency, the user must apply with a different agency.

#### 4. Trip for the driver

Check if there is a trip created in the driver's account which will correspond to the vanpool. You can review the trips by selecting "Manage Your Trips" under the "Ride Match" menu. If there is no trip, add a Daily Commute trip.

If the trip is to be marked as an operating vanpool, the trip must have the following criteria:

- The trip should have only vanpool mode selected. If both vanpool and carpool are selected, go to the trip that correlates with the van, and select the "Edit Trip" function. From there you can deselect the carpool option.
- The trip should not have a vanpool interest group or already be in a vanpool.

#### 5. Move the user to a single driver vanpool

Go back to the administration application and pull up the user account via the "Users" menu. Click on the link labeled "Move user to single driver vanpool". Fill out the form which comes up with Agency, Home Phone, Work Phone, Employer, and Trip Options and select "Continue". If the operation is successful, you will see the following message: "You can now process the vanpool interest application and assign a van number to this user's vanpool." This process creates a Vanpool Interest Application for the group.

#### 6. Van unit #

Check if the van unit # (HOV#) to be assigned to the vanpool is in the system. Go to the **Vanpool** menu and use the option "Look up a Vehicle/Vanpool using Van Unit. The van must exist in the system and must be available (or not be currently assigned to another vanpool). If the van does not exist in the system – you will need to add the van before it can be assigned to a group.

#### 7. Process the pending vanpool application

You can now approve the vanpool application. In the **Vanpool** menu, you will click on the link labeled "Process Pending Applications". Look for the application corresponding to the user and fill out the required fields including van unit number, vanpool start date, Legacy Vanpool ID and any additional comments and approve the application.

The screenshot shows a navigation bar with 'Users' and 'Get Details' buttons. Below is a user profile for Tom Lee. The 'Member's Trip(s)' table shows one trip from 3201 Smith Ave, Everett, 98201, USA to 1675 Newport Way NW, Issaquah, 98027, USA. A callout box points to a link labeled 'Move user to single driver vanpool'.

Start Address	End Address	Route Type	Status
3201 Smith Ave, Everett, 98201, USA	1675 Newport Way NW, Issaquah, 98027, USA	Recurring	Not in Confirmed Pool

Select this link to move user to a single driver vanpool. If this link does not appear, then the trip does not meet the required criteria to be marked as a single driver vanpool. If link is not visible, access the user's account and ensure the trip meets the required criteria.

Figure – Mark as single driver vanpool

### Submit vanpool application for user

Agency providing van:  Employer:

Home Phone:  Work Phone:

#### Vanpool Primary Contact

Searching users will see the primary contact information on the match list. The vanpool primary contact will be copied on ridematch request emails from searching users to drivers.

First Name:  Last Name:

Email:  Phone:

#### Vanpool Schedule

Select the day(s):	Start Time	Flexible by	Return Time	Flexible by
<input checked="" type="checkbox"/> Monday	<input type="text" value="8:00 AM"/>	<input type="text" value="30 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="30 minutes"/>
<input checked="" type="checkbox"/> Tuesday	<input type="text" value="8:00 AM"/>	<input type="text" value="30 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="30 minutes"/>
<input checked="" type="checkbox"/> Wednesday	<input type="text" value="8:00 AM"/>	<input type="text" value="30 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="30 minutes"/>
<input checked="" type="checkbox"/> Thursday	<input type="text" value="8:00 AM"/>	<input type="text" value="30 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="30 minutes"/>
<input checked="" type="checkbox"/> Friday	<input type="text" value="8:00 AM"/>	<input type="text" value="30 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="30 minutes"/>
<input type="checkbox"/> Saturday	<input type="text" value="N/A"/>	<input type="text" value="0"/>	<input type="text" value="N/A"/>	<input type="text" value="0"/>
<input type="checkbox"/> Sunday	<input type="text" value="N/A"/>	<input type="text" value="0"/>	<input type="text" value="N/A"/>	<input type="text" value="0"/>

Work from:  to

#### Other Details

Notes: (These will show on the match list.)

Include in matching. (Uncheck this box if the van is not to be matched with searching users. For example, uncheck the box if the van is full.)

Allow one time trip matches. (Check this box to include the van in the matching for one time trips posted by searching users.)

Figure – Single driver vanpool application

This message indicates the operation was successful – the single driver vanpool interest application has been submitted. The next step is to approve the application and assign a van unit to the van.

You can now process the vanpool interest application and assign a van number to this user's vanpool.

<b>Member Details</b>	<b>Account Details</b>
Member Name: Farah Leur Contact Phone: 5678904567 Employer Name: N/A	Email Address: farah.leur@gmail.com Last Activity Date: 8/6/2011 Last Visited Domain: my.icarpool.us
Email Validated: Yes Email Validation Link: N/A Account Locked: NO Account Disabled: NO Account Status: Active	<a href="#">Access User Account</a>  <a href="#">Reset Password</a> <a href="#">Unlock User</a>  <a href="#">Disable User Account</a>

Figure – Single driver vanpool application submission

Vanpool

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Get Van Details

**Van Details**

Van Number: 1111	Vehicle Make: Dodge	<a href="#">Edit Vehicle Details</a>
Model: Caravan	Last Odometer: N/A	<a href="#">Retire Van</a>
Seating Capacity: 7	Seating Available: 7	
Van Status: Available	Agency: Regional Agency	

This Van does not have any passengers currently.

A van can be retired temporarily for maintenance purpose. The van may be made available by unretiring the van.

Figure – Looking up the status of a van

If the Van Status is "Available" then the van can be assigned to a new vanpool.

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October 31, 2012

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**Vanpool Interest Application**

**Name:** [Ulka Clark](#) **Email:** [ulka@kittsdom.com](mailto:ulka@kittsdom.com)

**Application Date:** 10/25/2010 **Vanpool Provider:** Regional Agency

**Home Address:** 200 James st Seattle WA 98104-2212 **Home Phone:** 4253764534

**Work Address:** 3000 Smith ave Everett WA 98201-3766 **Work Phone:** 4253461300

**Employer:** ACME **Commute Days:** 5

**Commute Mode:** Vanpool **Daily Round-Trip Miles:** 56.93

**How did you hear about the program?** Website

	Passenger Name	Email Address	Role	Miles Traveled to Work	Miles Traveled to Home
1)	Ulka Clark	ulka@kittsdom.com	Primary Driver	28.47	28.47
2)	--	--	--	--	--
3)	--	--	--	--	--
4)	--	--	--	--	--
5)	--	--	--	--	--
6)	--	--	--	--	--
7)	--	--	--	--	--
8)	--	--	--	--	--
9)	--	--	--	--	--
10)	--	--	--	--	--
11)	--	--	--	--	--
12)	--	--	--	--	--
13)	--	--	--	--	--
14)	--	--	--	--	--
15)	--	--	--	--	--

**Van Unit #:**  **Vanpool Start Date:**

**Legacy Vanpool ID:**

**Enter Comments (up to 500 chars):**

Comments entered will be sent to the user

[Approve Application](#)
[Reject Application](#)

Figure – Approving a vanpool interest application with a single driver

Once you approve an application, the system marks all users in the application with the status "in vanpool". In addition, the system creates an AutoLog trip profile for all passengers and the primary driver based on their marked pickup and drop-off locations.

Comments entered here are sent to the user in email.

**Emails:** [VanpoolEnrollmentApprovalNotification](#), [VanpoolEnrollmentRejectedNotification](#)

## Adding a new vanpool (with one or more passengers)

The ride matching website allows users interested in forming new vanpools to team up into groups called as Vanpool Interest Groups (VIG). A vanpool interest group has two or more users in the group. When users in the VIG meet the threshold configured by the agency for “Minimum number in the vanpool group to submit application”, the driver in the VIG can take the next step by submitting an application for vanpool interest. The vanpool administrator gets an email notification corresponding to the application and this enables the vanpool administrator to help convert the VIG to an operating vanpool.

For proceeding to the next step, the users in a VIG must not have conflicting roles. Only one user can be a driver and only the driver can submit the vanpool interest application. If a VIG is formed with two drivers, the user who submits the vanpool application first becomes the driver.



Figure – Trip indicating Vanpool Interest Group status

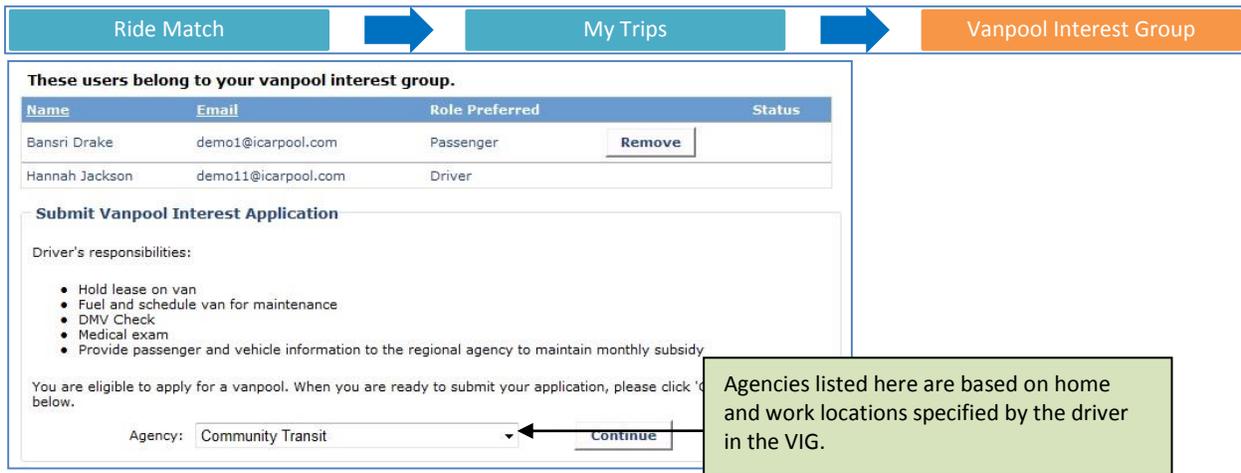


Figure – The driver in a VIG submits a vanpool interest application to the appropriate agency

**All fields are required.**

**Fill out Vanpool Interest Application details**

Vanpool Provider:

First Name:  Last Name:

Home Address:  [Change](#)

Mailing Address:  [Change](#)

Work Address:  [Change](#)

Email:

Home Phone:  Work Phone:  Ext:

Employer:

How many days per week do you commute to work?

Daily Round-Trip Miles (DRTM):  miles

How do you usually get to work?

How did you hear about the vanpool program?

Figure – The vanpool interest application filled by the driver has contact information along with a few other fields.

**Vanpool Primary Contact**

Searching users will see the primary contact information on the match list. The vanpool primary contact will be copied on ridematch request emails from searching users to drivers.

First Name:  Last Name:

Email:  Phone:

**Vanpool Schedule**

Select the day(s):

Day	Start Time	Flexible by	Return Time	Flexible by
<input checked="" type="checkbox"/> Monday	<input type="text" value="8:00 AM"/>	<input type="text" value="15 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="15 minutes"/>
<input checked="" type="checkbox"/> Tuesday	<input type="text" value="8:00 AM"/>	<input type="text" value="15 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="15 minutes"/>
<input checked="" type="checkbox"/> Wednesday	<input type="text" value="8:00 AM"/>	<input type="text" value="15 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="15 minutes"/>
<input checked="" type="checkbox"/> Thursday	<input type="text" value="8:00 AM"/>	<input type="text" value="15 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="15 minutes"/>
<input checked="" type="checkbox"/> Friday	<input type="text" value="8:00 AM"/>	<input type="text" value="15 minutes"/>	<input type="text" value="5:00 PM"/>	<input type="text" value="15 minutes"/>
<input type="checkbox"/> Saturday	<input type="text" value="N/A"/>	<input type="text" value="0"/>	<input type="text" value="N/A"/>	<input type="text" value="0"/>
<input type="checkbox"/> Sunday	<input type="text" value="N/A"/>	<input type="text" value="0"/>	<input type="text" value="N/A"/>	<input type="text" value="0"/>

Work hours:  to

**Other Details**

Notes: (These will show on the match list.)

Include in matching. (Uncheck this box if the van is not to be matched with searching users. For example, uncheck the box if the van is full.)

Allow one time trip matches. (Check this box to include the van in the matching for one time trips posted by searching users.)

**Pickup and Drop-off Locations**

Name	Email	Pickup	Drop-off	Action	Status
Bansri Drake	demo1@icarpool.com	Vanpool Origin	Washington Park		<input checked="" type="checkbox"/>
Hannah Jackson	demo11@icarpool.com	Everett Station	Washington Park	<input type="button" value="Pickup/Drop-off"/>	<input checked="" type="checkbox"/>
Sarah Patterson	demo15@icarpool.com			<input type="button" value="Pickup/Drop-off"/>	<input type="checkbox"/>

The warning sign indicates Pickup and Drop-off locations have not been specified for this passenger. Click on the button to fill out these locations. All warnings must be resolved in order to be able to submit the VIG application.

Figure – Driver specifies primary contact, schedule, pickup/drop-off locations for the vanpool

**Assign Roles**

<b>Bansri Drake</b>	<input checked="" type="checkbox"/> Primary Driver	<input type="checkbox"/> Backup Driver	<input type="checkbox"/> Bookkeeper	<input type="checkbox"/> Passenger
<b>Hannah Jackson</b>	<input type="checkbox"/> Primary Driver	<input checked="" type="checkbox"/> Backup Driver	<input checked="" type="checkbox"/> Bookkeeper	<input checked="" type="checkbox"/> Passenger
<b>Sarah Patterson</b>	<input type="checkbox"/> Primary Driver	<input type="checkbox"/> Backup Driver	<input type="checkbox"/> Bookkeeper	<input checked="" type="checkbox"/> Passenger

Figure – A primary driver and a bookkeeper are two required roles in order to submit the VIG application

**Vanpool Interest Application**

**Name:** [Bansri Drake](#) **Email:** demo1@icarpool.com

**Application Date:** 8/10/2011 **Vanpool Provider:** Community Transit

**Home Address:** 428 Cedar Ave, Snohomish, WA 98290, USA **Home Phone:** 5689345457

**Work Address:** 12040 NE 128th St, Kirkland, WA 98034, USA **Work Phone:** 4567657689

**Employer:** Interact Soft Inc **Commute Days:** 5

**Commute Mode:** Vanpool **Daily Round-Trip Miles:** 73.2

How did you hear about the program? Internet

	Passenger Name	Email Address	Role	Miles Traveled to Work	Miles Traveled to Home
1)	Bansri Drake	demo1@icarpool.com	Primary Driver	36.6	30.48
2)	Hannah Jackson	demo11@icarpool.com	Passenger	29.24	28.61
3)	Sarah Patterson	demo15@icarpool.com	Backup Driver, Bookkeeper, Passenger	25.23	24.05
4)	John iCarpool	john.icarpool@gmail.com	Passenger	29.24	28.61
5)	--	--	--	--	--
6)	--	--	--	--	--
7)	--	--	--	--	--
8)	--	--	--	--	--
9)	--	--	--	--	--
10)	--	--	--	--	--
11)	--	--	--	--	--
12)	--	--	--	--	--
13)	--	--	--	--	--
14)	--	--	--	--	--
15)	--	--	--	--	--

Van Unit #:  Vanpool Start Date:

Legacy Vanpool ID:

Enter Comments (up to 500 chars):

Comments entered will be sent to the user

[Approve Application](#) [Reject Application](#)

Figure – Vanpool agency processes the application from the VIG

## Changing a van assigned to a vanpool

If the vehicle assigned to a vanpool changes, then the corresponding change must be recorded in the system. The link to change a vehicle assigned to a vanpool is shown only for vanpools currently in operation. Find this by going to the **Vanpool** menu, selecting the van and clicking on “Get Van Details”. Then click on the “Change Van Unit” link. Select the new van unit from the drop down list and proceed to save the changes.

The diagram illustrates the process of changing a van assigned to a vanpool. It starts with a blue box labeled "Vanpool", followed by an arrow pointing to an orange box labeled "Get Vanpool Details", and another arrow pointing to a final orange box labeled "Change Van Unit". Below this flow is a screenshot of the "Change Van Unit for this Vanpool" form. The form contains a dropdown menu for "New Van Unit #" with "V009" selected, and a text box for "Date of Change:" with "06/18/2010". Below the form is a green callout box with text: "Only van units which are not assigned to a vanpool (vans which have 'Available' status) appear in the drop down list and can be assigned to the vanpool."

Figure – Changing a van assigned to a vanpool

## Changing a primary driver of a vanpool

### 1. User account for driver

Check if the user account for the driver already exists. You can check if the account exists by using the various options available under the “Users” menu. You can perform a look up using email address, partial name or partial screen name. If the account does not exist, create a new account.

### 2. Home, work and mailing address for the driver

Proxy into the driver’s account and check if the account has the Home, Work and Mailing addresses configured. You can review the addresses under the **Profile** menu by selecting “My Locations”. If the account does not have all of the addresses configured, add them to the profile.

### 3. Ensure agency network is in the user’s profile

Select the **Profile** menu and then “My Networks.” This will show networks based on home and work associations. Please note – if you do not see your agency network, the user’s vanpool request cannot be serviced by your agency. Agency vanpool programs provide a van to users who either live or work in their jurisdiction. If the user neither lives nor works in the region serviced by your agency, the user must apply to a different agency.

### 4. Add the new driver as a passenger in the current vanpool

From the administration application, pull up the vanpool available under the Vanpool menu and check if the user is already a passenger in the vanpool. If the user is not in the vanpool, click ‘Add passenger’ to add the user to the vanpool as a passenger.

### 5. Change driver

You can now change the driver of the van. In the record for the new driver click “Mark as Primary Driver”. Changing the primary driver marks the old driver as a passenger in the vanpool. If the old driver is no longer in the vanpool – then the record can be removed from the vanpool by using the link labeled “Remove Passenger”.

Van Details		
Van Number: 456	Vehicle Make: Toyota	<a href="#">Edit Vehicle Details</a>
Model: Siena	Last Odometer: 4/3/2011	<a href="#">Record Odometer Reading</a>
Seating Capacity: 8	Seating Available: 8	<a href="#">Change Van Unit</a>
Van Status: Operating Vanpool	Agency: Community Transit	<a href="#">Terminate Vanpool</a>
Legacy Vanpool ID: 2010456	Vanpool ID: 2701	<a href="#">Manage Vanpool Details</a>
Trip Code: 73565		<a href="#">Manage Vanpool Route</a>
		<a href="#">Add Passenger</a>
Vanpool Primary Contact Details		
First Name: John	Last Name: Smith	<a href="#">Edit Contact Details</a>
Email: demo8@icarpool.com	Phone: 4253245432	
Vanpool Details		
Name: <a href="#">Bob Lee</a>	Email: demo27@icarpool.com	
Start Date: 7/26/2011	Phone: 2065431254	
Role: Primary Driver		
Pickup At: Vanpool Origin	Dropoff At: Vanpool Destination	

Use this link to add a passenger or new driver to the vanpool using the screen name.

Figure – The first step when changing the primary driver is to add the new driver to the vanpool as a passenger. Administrators can reassign the primary driver role to an existing passenger in the vanpool.

### Add Passenger to Vanpool

Screen Name:

Pickup Location:

Drop-off Location:

Vanpool Join Date:

When a passenger is added to the vanpool, a new vanpool trip will be created for the passenger.

Figure – When adding a new passenger to the vanpool, the screen name, pickup location, drop-off location and the join date are required.

Vanpool
➔
Get Vanpool Details

<b>Van Details</b>		
Van Number: 456	Vehicle Make: Toyota	<a href="#">Edit Vehicle Details</a>
Model: Siena	Last Odometer: 4/3/2011	<a href="#">Record Odometer Reading</a>
Seating Capacity: 8	Seating Available: 1	<a href="#">Change Van Unit</a>
Van Status: Operating Vanpool	Agency: Community Transit	<a href="#">Terminate Vanpool</a>
Legacy Vanpool ID: 2010456	Vanpool ID: 2701	<a href="#">Manage Vanpool Details</a>
Trip Code: 73565		<a href="#">Manage Vanpool Route</a>
		<a href="#">Add Passenger</a>
<b>Vanpool Primary Contact Details</b>		
First Name: John	Last Name: Smith	<a href="#">Edit Contact Details</a>
Email: demo0@icarpool.com	Phone: 4253245432	
<b>Vanpool Details</b>		
<b>Name:</b> <a href="#">Bob Lee</a>	<b>Email:</b> demo27@icarpool.com	
<b>Start Date:</b> 7/26/2011	<b>Phone:</b> 2065431254	
<b>Role:</b> Primary Driver		
<b>Pickup At:</b> Vanpool Origin	<b>Dropoff At:</b> Vanpool Destination	
<b>Name:</b> <a href="#">Pilar Ackerman</a>	<b>Email:</b> demo13@icarpool.com	<a href="#">Remove Passenger</a>
<b>Start Date:</b> 7/26/2011	<b>Phone:</b> 500-555-0132	<a href="#">Mark as Primary Driver</a>
<b>Role:</b> Passenger		
<b>Pickup At:</b> Lynnwood Transit Center	<b>Dropoff At:</b> Vanpool Destination	
<b>Name:</b> <a href="#">Jane Mathew</a>	<b>Email:</b> jane.jcarpool@gmail.com	<a href="#">Remove Passenger</a>
<b>Start Date:</b> 7/26/2011	<b>Phone:</b> 425-765-1243	<a href="#">Mark as Primary Driver</a>
<b>Role:</b> Bookkeeper, Passenger		

These links are visible only for users in the vanpool who are not currently the primary driver. If a primary driver is to be removed from the vanpool – a new driver must first be assigned to the vanpool before the old driver is removed.

Figure – When a vanpool has others in the group apart from the current primary driver, the vanpool supports Change Driver and Remove Passenger functionality

## Changing a vanpool route – add/remove stops

When stop locations or the route taken by an operating vanpool change, the corresponding change must be recorded in the system. Go to the **Vanpool** menu and look up the vanpool that needs a route change. Click on the link “Manage Vanpool Route” You can opt to view Park and Ride locations on the map by checking the box “Show Park and Ride Locations”. Once visible, a Park and Ride location can be selected as a trip origin, destination or stop by right clicking the Park and Ride icon from the map view and selecting the stop type. To ensure you are selecting the correct location, you can zoom in and view locations through a bird’s eye view if required.

If the option “Allow self service vanpool route change” is set to Yes, then the vanpool driver is able to perform these operations by logging into their account.

Vanpool
➔
Get Vanpool Details
➔
Manage Vanpool Route

+ Add Stop

If instead of the map interface, you know the address of a stop location – enter the address using this button. Make sure you have the zip code.

Address		
Origin	Vanpool Origin (2101-2199 Hewitt Ave, Everett, WA 98201, USA )	<a href="#" style="color: red; text-decoration: underline;">Change</a>
Stop	Everett Station (3201 Smith Ave, Everett, 98201, USA )	⬇ Move Down
Stop	Everett Memorial Stadium (3900 Broadway, Everett, WA 98201, USA )	⬆ Move Up ⬇ Move Down
Stop	Lynnwood Transit Center (20100 48th Ave W, Lynnwood, 98036, USA )	⬆ Move Up ⬇ Move Down
Stop	Univ of Washington NE Campus (1013 NE 40th St, University of Washington, Seattle, WA 98105, USA )	✕ ⬆ Move Up ⬇ Move Down
Stop	Swedish Hospital (747 Summit Ave E, Seattle, WA 98104, USA )	✕ ⬆ Move Up
Destination	Vanpool Destination (901 12th Ave, Seattle University, Seattle, WA 98122, USA )	<a href="#" style="color: red; text-decoration: underline;">Change</a>

Figure – Changing the route for a vanpool

You can right click on the map and perform operations to alter the route or drag the route to assign waypoints. A waypoint is only recorded to represent the route taken. Waypoints are never used for ridematching purposes. Stop locations are only used for ridematching purposes if they have an active passenger assigned to them.

**BEST PRACTICE** – For vanpools which have long routes and multiple, consider adding a passenger to make the intermediate stops active for ridematching purposes.

**+ Add Stop**

Address		
Origin	Vanpool Origin (2101-2199 Hewitt Ave, Everett, WA 98201, USA )	<a href="#">Change</a>
Stop	Everett Station (3201 Smith Ave, Everett, 98201, USA )	↓ Move Down
Stop	Everett Memorial Stadium (3900 Broadway, Everett, WA 98201, USA )	↑ Move Up ↓ Move Down
Stop	Lynnwood Transit Center (20100 48th Ave W, Lynnwood, 98036, USA )	↑ Move Up ↓ Move Down
Stop	Univ of Washington NE Campus (1013 NE 40th St, University of Washington, Seattle, WA 98105, USA )	✕ ↑ Move Up ↓ Move Down
Stop	Swedish Hospital (747 Summit Ave E, Seattle, WA 98104, USA )	✕ ↑ Move Up
Destination	Vanpool Destination (901 12th Ave, Seattle University, Seattle, WA 98122, USA )	<a href="#">Change</a>

Figure – Bird’s eye view with a Park and Ride

## Terminating a vanpool

Once a vanpool has folded, the vanpool needs to be terminated from the system. The link to terminate a vanpool can be found by looking up the vanpool. The system requires only the termination date as input. Terminating a vanpool makes the van status available and deletes the vanpool group. Note: that driver stays active in the system, with Drive as a preference.

Vanpool → Get Vanpool Details → Terminate Vanpool

**Terminate this Vanpool**

Termination Date:

Terminating a vanpool is an irreversible operation. All membership data, stop locations associated with this vanpool will be removed. You will still have limited access to past ridership data for this vanpool.

Figure – Terminating a vanpool

## Reports

The ride matching system provides multiple ready to use reports in the administration application. The reports are found under the Reports menu. Many reports support filter criteria such as date ranges and additional parameters so that relevant data can be gathered. The reports are exportable to Excel and PDF formats for further processing.

List of reports:

1. Vanpool Vehicle Inventory – This report provides an aggregate view of various vehicles in the fleet.
2. Vanpool Van Status Report – This report provides a list of all the vans belonging to the agency complete with the Van Number, Vanpool ID, Legacy Vanpool ID (GIN), Origin, Destination, Employer and Driver information.
3. Vanpool Annual Summary – This report provides annual summary in terms of monthly passenger miles, monthly driver miles and monthly boardings based on trips logged in the calendar. **The report is generated from vanpool trip logs in real time.**
4. Vanpool Activity Report – This report provides a list of new vanpool start-ups and vanpool terminations in a given date range.
5. Vanpool Van Activity Report – This report provides a list of van including such as van unit changes, van driver change and vanpool lease cost rate change.
6. Vanpool Current Status Report – This report provides summary of active vanpools, drivers, passengers, users interested in vanpool.
7. Vanpoolers Not Logging Trips Report – This report provides a list of vanpoolers who have not logged trips in the calendar from the date configured for the report. This list enables an administrator to target outreach to vanpoolers not logging trips and encourage them to do so. **The report is generated from trip logs in real time.**
8. Vanpool Members List Report – This report provides a list of all vanpool members including driver, passenger, backup driver and book keeper. The details include contact information, van number and role of the vanpool member.
9. Vanpool Interest Group Report – This report provides a list of users in the network who are currently in a vanpool interest group. The report does not list users who may be in the vanpool interest group but are not associated with the network.



Figure – Vanpool reports