



RBS GoChart 2000 - Version 14 Release Notes - System Date 2/1/05

The GoChart2000 System has been in distribution for 7 years now. During this time we have averaged two version updates to the system every year. The v14 release is the latest of these enhancements to the system. These updates to the system are available to all GoChart users with a current support contract in place and distributed with all new system licenses. For complete documentation on all version updates and RBS modules visit our website at www.rbs2000.com

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DATABASE CHANGES

Vehicle Prep Time or Slop Time

This time in whole minutes is entered in Systems Variables in Company Setup, Slop Time or Vehicle Prep Time, for calculating utilization and availability. This is added to the off-duty time of each charter to determine scheduling conflicts.

Driver Pay Markup

This percentage is entered in System Variables and is used by the Post Departure Reconciliation and Contribution Calculator to better reflect the true cost of Driver Pay.

Customer Street 1, Street 2

These fields are increased in size to 30 characters each from 25.

Location City Name

Change location city name to accommodate situation where there are 2 cities in the same state with the same name. For example: Cambridge MA. In order for Prophecy to work properly, you have to have the City Name and County as *Cambridge (Middlesex)* to differentiate from Cambridge MA in Worcester County.

Number of Pax Carried

Add #Pax carried to GoMile3000 record. This was also added to the State Summary.

Bus Number

Increase Bus ID # to 10 Characters. Added EZ-Pass ID Number to Vehicle Table

Driver Information

New Fields

- 2nd Street
- Email Address
- Part Time / Full Time (Employment Status)
- Driver Termination Date, Birth Date, Date of Next Physical

Expand Driver Info Report to select by Next & Last Physical, Drug Test and License Expiration. Driver Reports can be found Under Utilities - Lookup Tables - Drivers.

New Lookup Table - Fuel Types

This table contains cost per gallon/liter for fuel, by type. This variable has been removed from the System Variables under company setup. The cost/gallon/liter for fuel is used to calculate Estimated Contribution in the Post Departure Reconciliation Module.

Actual cost per mile for fuel and maintenance is now a variable in the Vehicle table. This value is filled in from the RTA maintenance system for customers who have this system.

FUNCTIONAL CHANGES

List of Charters (Quotes, Line-Runs, etc.) - Screen Format Change

Select Garage

In the upper left hand corner of any charter list, you now see **Garages**. Clicking here gives you a list of all current garages in the system. To show or hide work from a particular garage, simply click on its name. The default is that all garages are checked.

Column Search

We have re-organized the search interface on the current charter list and have done away with the pull down to select multi-level sorts of the list. To do a single level sort, simply click on the column header you want the list to sort by it will be signified as the primary searchable column by its turning red. Type in the column search box to search incrementally by letter. **TIP: If the date field is the primary search column you have to type in YYMMDD or YYYYMMDD depending on the date picture that your system is setup for – in Canada it may be YYDDMM or YYYYDDMM. The trick is you have to type in the Year first. (This is a Y2K compliance issue.)** To do a multi-level search, first click on the columns in the order you want them sorted. For example if you wanted to see all the work for a customer in date order, click on the date column and then on the Charter Party column. **RESET FILTERS** sets the screen back to the default, which is date ordered.

Text Search

This is a free form exact match (not case sensitive) search of the itinerary, group name, points notes and PO number fields of all open charters. For example if you type in Flight, you will get a list of all the charters that have the word flight in any of these areas. **RESET FILTERS** returns you to the full list. You can narrow your search by typing in *AA Flight 1234*. You will get only the charter(s) that have this exact match in one of those areas.

PD Status Flag

We have added an additional status flag to the list of current charters. **DP** means that a Deposit has been paid. This is in addition to **IN** (an invoice has been printed), **CN** (a confirmation has been printed) and **PD** (The charter is paid in full).

First Pickup

1st Pickup or Origin has been added to the list of Columns

Dispatch Screen

As previously noted, the dispatch screen can be stretched up and down. For higher resolution monitors, this dramatically increases the number of charters displayed.

Garage and Group Name

A column for Garage and Group Name has been added to the dispatch screen and is sortable by clicking on that column header. This column can be shrunk to nothing by dragging the column closed, as is the case with other columns on this screen to customize the board to your view. These column widths are maintained after you click on OK on the dispatch screen. If you lose columns and need the restored, **Control-D** (pressing the Ctrl and D keys at the same time) will reset your screen back to default.

Driver Employment Status

There is now an F or P displayed on the driver list just before the hourly display on the scheduling screen. This tells you if a driver is full or part time, based on driver employment status.

Vehicle Prep Time

Previously mentioned, this item in Systems Variables under Company Setup is used to calculate when a vehicle can come back online for re-scheduling. If a vehicle is scheduled before the end of it's' vehicle prep time, the system will warn but will not stop the dispatcher from assigning the vehicle. Vehicle Prep Time is also taken into account when analyzing vehicle utilization performance of actual vs. optimal.

Creating a Charter

Duplicating Earlier Date Charters

Duplicating a Charter for a date earlier than today now warns you that it is earlier than today.

Blank Number of Buses

When turned on it blanks the number of buses for a move when creating a charter. (When not turned on, it is 1) This feature must be turned on by RBS

Selecting Bustype from Availability By Type

When creating a new charter or quote, you can select the bus type from the hourly availability by type display by double-clicking on the **Type** you want to select.

Quote Schedule on OK

We have added the schedule on OK button from the quote Summary Screen so that users can quickly jump to this view of the data.

Batch Payments

When creating Batch Payments after the customer has been selected and their OPEN UNPAID work is displayed, the default sort of this list is now the departure date not charter number. The columns in this interface are also hot so that you can view by other sort criteria by clicking on a column header.

Batch Close

There are several new items in Batch Close under Reports – Batch Process – Batch Close. In addition to Closing Charters and Line Runs, you can now choose to permanently delete Quotes. There are also options to Close with Credits or Close with Zero Costs (Such as Line Runs).

INI Setup

We have added a menu item called INI Setup. This gives the user the ability to:

- Select the default scheduling garage to be ALL or different from the “booking garage”
- Show Line Runs to be automatically checked on the scheduling screen

Turn On or Off the warning that a vehicle may not be available when a booking is made

- Un-schedule a vehicle if the bustype is changed in the charter main move info screen

REPORT CHANGES AND ADDITIONS

Standardization

We have audited the report suite and found some places where there may have been inconsistencies in how we defined start and end times. We have standardized on the following:

For Accounting Reports based on departure date we use the Depart from 1st Pickup date/time to determine which charters or moves are included in the report.

For Accounting Reports Based on Return Time we use the last drop-off date and time to determine which charters or moves are included in the report.

For Scheduling and Dispatch Reports we use the On-Duty date/time for “Depart Date” based reports and the Off-Duty date/time for “Return Date”.

In receipts, Reports Details by Date.

The default is now to have the primary sort by Receipt Date. Systems with the Spilt Company module have the option to have the primary sort be by charter type.

Customer Reports

Added Customer Type & Fax Number to Customers Report

Under Utilities -- Lookup Tables -- Customers -- Print

Customer Labels – Several New Additions

Under Reports -- Management Reports – Customer Labels

- Added E-mail Address as a column
- Added a **Print to File** option
- Added the ability to select Active or Inactive or Both

Customer Labels – Traveled Since Date

This has been confusing for people. Here is how it works. If you select **ALL** in each of the three boxes at the top of the screen, the traveled since field is ignored.

If you want to select customers that have chartered a coach since a particular date, you should select multiple charter types by left clicking on the charter type with the control key held down. This is standard Windows behavior for selecting multiple choices in a list dialog box. If you choose today’s date as the traveled since date you will basically get everybody that you have on the books for bookings today and in the future. If you select a year ago today as the traveled since date, you will get all customers who have traveled in the past year and have bookings going forward into the future.

You can set up more complex queries by selecting criteria from multiple types, Charter Type, Customer Type and Referral Source. For example, you could get all customers who are coded in their customer master file as school who have been on a charter type of *Tour* and Referral Source of *Newspaper Article*.

Schedule / Dispatch Reports

Driver Milestone Report – Group by Garage

This report now groups drivers by garage. If you select **Print to File** with this report, there now is an entry for garage in the line for each move. There is now also a separate line for each driver on moves with multiple drivers assigned.

Coach Requirements Weekly Spreadsheet View

Added Charter # to this report

Driver Diary Reports - Can Select Single Garage

Drivers Orders - Removed Customer Address and Phone on Sub-Contracted Charters

Driver and Vehicle Diary Summary - Only Open Charters and Line Runs Option

There is now a check box to request open charters and line runs only. This is useful if you want to make a bus or driver inactive and have to un-assign them from future open work in order to do so. (We made a change in version 13 that you could make a driver or vehicle inactive as long as they did not have any future work assigned to them.)

Sales Reports

Customers with Quotes Labels under Reports

Select a Date Range for booking date and a standard laser label format is created for all customers who have had a quote done for them in this date range.

Sort by Origin or Destination on Charter Sales Summary

More and more states and airports and stadiums are requiring taxes for travel to and from certain destinations and pickups.

Quote Follow Up Report - Added Group by Sales Person Option

Bookings By Salesperson

Added “All” as a selection criteria, so that you do not have to select them individually to get all

E-Mailed Confirmations and Invoices

We have changed the standard “blurb” that goes in the body of the email for customers who have the email direct feature, due to the fact that some mail servers strip off attachments as follows:

*Attached is the Confirmation for Charter 6854.
Some mail services do not allow email attachments. If you do not have an attachment with this email or have difficulty opening it please contact me via email or at 555-555-2206.*

This is **Phone One** from company setup. The text and link to download Adobe Acrobat remain:

*The following attachment is viewed using Adobe Acrobat Reader.
It can be downloaded from <http://www.adobe.com/products/acrobat/readstep.html>*

CALENDAR EVENTS

See Additional Reference Events Documentation

A calendar event is something that blocks a driver or vehicle from availability in the dispatch module. You can enter or edit events from the dispatch screen by double clicking on the vehicle or driver and then selecting edit calendar button, or you can edit or create events from the Utilities Lookup Menu. This feature has been expanded to include an expanded view in the list of events to include start and end dates and times, the ability to delete events, and a check that does not allow you to create an event that conflict with a bus or driver that is already scheduled.

ADVANCED ACCOUNTING MODULE ADDITIONS

Advanced Accounting is an ADD-ON-MODULE. See Additional Reference

Transfer Receipt

This button is found under the Receipts tab. When selected, you are presented with a list of Charters with Open Balances for that Customer. When you select a charter it tells you how much is owed on that charter and lets you put in the amount to be transferred to the selected charter. A message is written in both the transfer from and the transfer to charter to indicate where the money came from and went to.

Post Period

This option is turned on only for systems that also have the Advanced Accounting Module Option Turned On. Under Batch Processes, there is a selection Option that is Post Period. The purpose of Posting is to MARK ALL CHARTERS – OPEN, CLOSED, CANCELLED, QUOTES and LINE RUNS and after they are POSTED absolutely no changes can be made to them. This is meant to be like an ACCOUNTING CLOSE for a Period and you usually will not POST a period until all financial transactions have been processed. For example, you might want to POST a fiscal Year after you done all the reports for that year. Some companies do POST Quarters or Months but usually it is not until each of the following periods have been transacted. For example you would not POST the 1st Quarter until the 2nd Quarter has passed. When you select POST CHARTERS from the Batch Processes Menu you are presented with an interface where you select the date charters departing or returning before or after should be posted. You are also presented with a list of all Open UN-POSTED Charters in the period, so that you can select which Charters you may NOT want to POST in the Period. Once POSTED, the only way that a refund or a charge associated with a charter in the POSTED PERIOD is to create an offsetting charter in the current period.

No Receipts Prior To Date

Just as you do not want to make changes that affect revenue in already reported accounting periods, you do not want to back date receipts into a period. On the Security Setup Screen there is a date field that when selected stops the back dating of receipts into this period.

POST DEPARTURE RECONCILIATION AND CHARTER CONTRIBUTION

This is an ADD-ON-MODULE. See Additional Reference Post Departure Documentation.

Driver Pay Markup is a new setting in System Variables under Company Setup. This percentage is added to the estimated or actual Driver Gross Pay to reflect the cost of Optional and Mandatory Benefits and reflected as cost in Individual Charter Contribution Calculations and Reports.

Per Diem has been added to the expense categories.

ENHANCED SECURITY AND PASSWORD PROTECTION

This Security Module is included with all network systems over 5 users. It is an ADD-ON-MODULE for smaller network systems. See Additional Reference for More Information.

RBS has enhanced the existing Security and Password System by adding a 3rd password level (Manager) and the ability to assign a User Manager or Administrator password to just about every report and screen in the GoChart System. This will allow for different individuals to have access to view and perform jobs in different areas. You will find Security Setup located under the Utilities area. A complete list of password protected reports and program screens are available in the updated Security documentation.

GOMILE 3000: IFTA COMPATIBLE FUEL TAX REPORTING MODULE

GoMile3000 is an ADD-ON-MODULE. See Additional Reference for More Information

Number of Passengers

A data entry field was added to the GoMile Reconciliation Screen to capture the number of Passengers traveled on each bus. This information is then rolled up into the State Mileage Summary Report for use in states that require this information.

NEW MODULE: VEHICLE TRANSFER

This is an ADD-ON-MODULE. Additional Reference Garage Vehicle Transfer Documentation

The purpose of this module is to allow companies with multiple dispatch garages to move equipment between garages. This way, the availability for the future sales and dispatch is properly reflected. Additionally, utilization analysis reports reflect inventory in the garages as they were available at a given time.

If you have any questions regarding this update or any other part of GoChart 2000, please contact us. You can call us at **800-448-7001** or send e-mail to support@rbs2000.com.