



COMPREHENSIVE GUIDE

# BREAKDOWN OF IMPLEMENTATION FOR PARATRANSIT SCHEDULING SOFTWARE



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A background image showing a woman in a wheelchair being assisted by a staff member on a bus ramp. The image is overlaid with a blue tint. The woman is smiling and looking towards the right. The staff member is standing behind her, holding the wheelchair. The bus is visible in the background.

“From implementation to maintenance support TripSpark has been very knowledgeable, accommodating, timely and easy to work with.”

*–Hiawathaland Transit*

There are two types of agencies who are seeking a software solution: Either you are already using a system and need to transition to something more powerful or you are implementing a solution for the first time. In this comprehensive guide, we examine the steps that are inherent to each type of agency, however, we also describe some of the key differences each user-type is likely to encounter. The first question you may have is: how long will this process take? The answer depends upon the requirements of each agency. The total project can constitute a few months. A “go live” stage normally takes a week, but

the planning stage is where most of the time is going to be spent. Regardless of your choice of vendor, be sure to measure more than once before you make the first cut.

While there may be a number of details that are unique to the implementation process for your agency, what follows are the general steps that most agencies encounter. If you are concerned about the implementation process, here is how to prepare for the process of implementation.



# 1. Operational Review

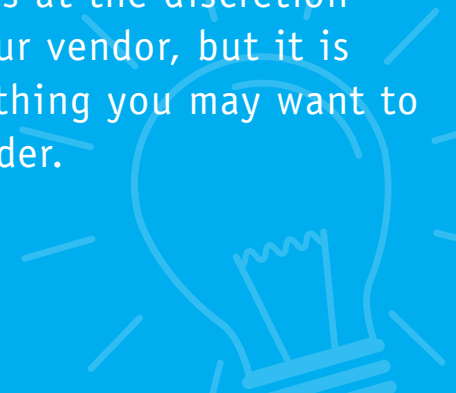
Before you approach a vendor, sit down and assess your total operational requirements. This can vary depending on the number of trips you do per day, the number of staff and vehicles you coordinate, the partnering agencies with whom you may be sharing service needs. When ready, contact a vendor and arrange for an on-site visit.

The operational review is the most important step. It is here that you ensure that there are no surprises in the project. A careful analysis of your agency will enable you to strategize the best way to integrate and implement the software, as well as document any gaps. You will want to focus on and discuss these gaps to determine if they need to be addressed in your project plan. The decisions made here will affect your long-term goals and budgetary concerns.



## TIP:

You may be able to save time and money by coordinating meetings over webex or conference calls. This is at the discretion of your vendor, but it is something you may want to consider.



## TIP:

Customized workspaces make the job of dispatching, scheduling and trip booking far easier.

## 2. Static Training

Based upon your initial plan, this part of the training is to help you realize the actual objectives and build your software experience the way you need it. Essentially, this is when key decision makers must learn how to set up their system. You will be able to determine the process for, among many things:

- Adding clients
- Setting common locations
- Config data

Now is the time to decide upon the customization of your workspace, if your vendor has the option to do so. Traditionally, browser screens display simply too much information. With a

customized approach, you can decide what data should be foregrounded and what data can be de-emphasized. This can make it easier for each unique staff member to drill down to the screens that each is required to use. Your paratransit scheduling software should allow you to set your own field names and create a workspace based upon your unique naming conventions. You should also have the choice to make certain field entries mandatory. If you know that a piece of data is essential for reporting, then you need to make sure you collect this data. Having mandatory field entries ensures this.

Static training is oftentimes done onsite, although there is a move towards remote training for this portion of the implementation. Because this can impact deployment costs, it's advised that you discuss these options with your vendor. Training can be done either online or over the telephone. However, if your agency books a larger number of trips per day, it is advised that you have more extensive onsite training. Due to larger capacity, you may require added assurance that your staff can manage the volume of booking traffic.



### 3. Operations Training

One-on-one training with your staff is now done in order to ensure that everyone will be able to use your software. Operations training should be done 100% onsite.

This is the most efficient way to teach the full range of functions now available through the software and any peripheral, in-vehicle technologies. It's also essential that your staff get both emotionally and intellectually prepared to transition from (either) one system to another, or from a manual system to a digital one.

A reservationist may currently be able to book in 3-4 minutes using a manual method. In the early stages of learning the digital method, that productivity can

fall. However, in a very short amount of time, they will be entering a trip in far less time than before. Once they experience the simplicity and ease of booking a trip, the shift to a digital system will make sense. Among the many areas to be addressed through training are:

- Live dispatching with drivers
- How to do same day bookings
- Automated scheduling practices
- Monitoring and acting upon data

A major part of this process is Scheduling Testing. Because so much depends upon the manner with which you use the scheduling aspect of the software, you need to pay special attention to

this element. At this point, be sure your implementation specialist helps you to analyze your scheduling setup, run test schedules and ensure that you are achieving desired efficiencies before the go live stage.

#### TIP:

This can be the most challenging part of the transition. Depending upon the comfort level and computer proficiency of your staff, shifting to a digital method can vary in acceptance.

## 4. Review and Revise and Retest

Before you commit to the “go live” stage, you need to ensure that all your homework is done and every staff member is prepared to take over. Determine the accuracy of all client data, route information and that all trips are set and all schedules are ready to go.

Some customers might expect that they can install peripheral tablet app devices on their vehicles at the same time that they are installing a new demand response solution. While this is possible, it is not the most prudent

path for an agency to take. There is more than enough to worry about when implementing the software systems without dealing with hardware issues at this time. Rather, it is suggested that you consider your complete implementation process as being multi-phased in order to allow every member of your team enough time and experience to handle the initial shift towards automated scheduling.



### TIP:

It's advised to install peripheral devices well after this initial stage is fully complete.

## 5. Go live

Once your system is fully operation and after the go-live stage, you will likely transition from deployment experts to customer care specialists.

If your agency is transitioning from one digital system to another, we suggest the following for safety's sake. For the first week of operation under your new paratransit scheduling software system, we recommend that you continue to add (overlapping) reservations into both

systems at the same time. This will serve as protection in the event that anything goes amiss during the first week of the go-live process. With this precaution in place, your original system can still be relied upon to maintain operations should an issue develop. However, to continue this for longer than a week will result in an excess of double-data entry, which is not sustainable for the long term. This is simply a temporary measure to ensure that nothing disrupts your service.

Hopefully this overview is able to answer some of the initial questions that you and your staff may have about implementing paratransit scheduling software solutions.

### TIP:

Be sure to continue to use overlapping reservations.

TripSpark Technologies provides a complete end-to-end solution for both fixed route and ADA complementary paratransit agencies. Learn more about how our paratransit software functions, contact us for a demo and see it in action.

