

# ATHENA RUN OPTIMIZATION

Education Logistics, Inc.

Training Guide

## Athena Run Optimization Training Guide

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### **INTRODUCTION TO RUN OPTIMIZATION**

Athena's Run Optimization feature uses your geographic and transportation data to help you develop the most efficient runs within the guidelines of your district's transportation policies. The system performs previously routine and repetitive tasks automatically, reducing the amount of time required to prepare for a new school year or respond to changes in transportation requirements.

Keep in mind as you proceed through this manual that the data used in the optimization process is derived from your existing transportation data. However, because it first acts as a simulator while you develop potential solutions, you can rapidly create a variety of different run solutions and evaluate the effects of the proposed changes all while you use Athena for your daily transportation work. The changes will not become permanent until you choose to confirm the solution within your production sites data.

Note that Run Optimization is an optional feature in Athena—If your district has not purchased Run Optimization, these functions will not be available in your system.

### **IMPLEMENTING RUN OPTIMIZATION**

The ultimate goal of Run Optimization is to take a selected group of bus stops and create a new set of runs that meet the changing needs of your district. This typically involves picking up the most students, with the fewest number of buses, in the least amount of time, requiring the balance of three key factors: the capacity of the buses available, the district-defined maximum run time, and the total distance traveled to pick up all the students.

In general, you use a "funnel" approach to optimize your runs. You start on a broad level by loading all the stops for one school, then you become more specific by selecting only those stops you want to include in the optimization problem. You then have the system create a set of optimal runs for this group of stops. After reviewing the results, you can modify the runs, first in small groups, then finally by individual runs or stops. It is often productive to try several different approaches to the same problem, determine the best features of each, then use them in the final runs. You can discard Run Optimization solutions at any time if you decide you want to start over with a new approach.

There are five basic steps in the run optimization process:

- 1. Load the data and define the optimization problem.
- 2. Use the automatic optimization tools to create a set of optimized runs.
- 3. Evaluate the results.
- 4. Make manual modifications as necessary.
- 5. Confirm the runs (be aware that this step will alter your actual transportation data).

### **OPTIMIZATION PREP WORK**

Listed below are prep work items you will need for optimization:

- Map Calibration Is an important part of prep work for transportation studies. It is the indicator whether the stop times in Athena produces are close enough to real life stop time values. If you adjust times in Athena frequently, you may not want to calibrate. The better calibration is, the less guess work must be done in the project. Note: If you are using Google, you need to make sure the map is well connected and has correct "No Travel" and Hazards on the map for walk calculations.
- 2. **Student Match Rate** Having kids matched is important for these studies so that the proper eligibility for ridership can be determined, and the distance to stops and stop assignments can be in place.
  - a. What are unmatched students? Students whose address cannot be located on the map.
  - b. Recognizing unmatched students Students that Geolocation is unmatched in the student import module.
- 3. **School Changes** Any school changes should be handled before Optimization is done. School data input, Bell times in place, Boundaries posted, and Eligibility updated.
- 4. Student Assignment to Stops If any work on student to stop assignments needs to be done; it should be done before run optimization takes place. The following changes can affect student assignment. Note: stops used for opt build runs need to have students assigned, because opt uses stop load in its calculations. Stops need to have at least one student assigned.
- 5. **Student Eligibility** Again, any boundary changes should be posted to their schools so that eligibility of students can be updated, any students who do not need stops anymore can be removed from them and any students who become eligible for transportation can have a stop assigned, creating new stops as needed. Stop locations could come from other schools formerly transporting students in that area.
- 6. Walk to school distances Any changes to walk to school boundaries should be posted as they affect eligibility as mentioned above. Depending upon the change stops and stop assignments may need to be added or removed for this work.
- 7. Walk to stop distance Changes in walk to Stop distance can affect the number of stops used for eligible students, this could mean more stop locations needing to be created (for reduction in distance) or less stop locations needed (for increases in distance)
- 8. **Transportation Accuracy** if using existing data in the study (for fleet reductions and evaluations), your transportation data needs to properly represent what is currently being done as much as possible.

### **GETTING STARTED**

1. Once logged in, go to Routing Management on the home page.



2. In the action bar, under Route Planning Operations, select Bell Time.



- 3. On the Bell Time landing page, create a task.
- 4. Select schools and bell times in the Augment Context window.

Augment BellTime Context	
	Cancel
With Bell Times from a School	With Bell Times from a Cluster
School	Cluster
210 Dartmouth Middle School	~
Bell Times for Chosen School	School/Bell Times in Chosen Cluster
School Type Bell Time	School Type Bell Time
☑ 210 ARRIVAL 7:45 AM   ☑ 210 ARRIVAL 2:10 PM   ☑ 210 DEPART 2:08 PM   ☑ 210 DEPART 3:15 PM	No Rows To Show
Runs To Load: 🔳 All 🕻 Stops Requests To I Unassigned Trips To Load: 🔲	None Choose Subset

5. On the Bell Time module landing page, be sure that you are in the Run Masters layer. Select Run Masters, located just above the map panel.

		Laye	ers:		0	Tr	ips	$\bigcirc$	Rur	n M	aste	ers	$\left( \right)$	) F	lun (	Cov	ers									
Edit	0	Stops	•	0	÷	Q	Ø	Runs	#	X	0	70	76	Ø	Opt	76	8	00.9 0'0	ę.	Xfrs	Ø	Ø	x	⊕	0	I
٩	Ý	5		Mint	(Si Hill	5	(21)			(	$\land$	2		4			~	Ì	_	$\gamma$ (	205	~ <b>r</b>	X			

6. Select your school and bell time in the Data Panel, in the Bell Time Views card.

Bell Time View	5	^
	Cluster Select O	Augment Context
210 - 7:45 AM, Dartmouth Middle School		
210 - 2:10 PM, Dartmouth Middle School		
210 - 2:08 PM, Dartmouth Middle School		
210 - 3:15 PM, Dartmouth Middle School		

7. Run optimization tools are located at the top tool bar of the map panel.





- a. Opt Resequence
- b. Opt Assign
- c. Opt Build Runs
- d. Opt Transportation Needs

### USING RUN OPTIMIZATION TOOLS

#### Optimize Resequence

As a user, I would like to take an existing run and make it more efficient, find the best sequence.

1. Select the run in the data panel.

Bell Time Views		^
	Cluster Select O	Augment Context
210 - 7:45 AM, Dartmouth Middle School		
210 - 2:10 PM, Dartmouth Middle School		
210 - 2:08 PM, Dartmouth Middle School		
210 - 3:15 PM, Dartmouth Middle School		

2. Then select the run in the data panel under the Runs card.

		Runs			^
		All All-F Clear	Clear-F	Sel Stops	Columns
Run ID	NeedEnbl E	■ NeedUsed ■ Vehicle	Route	Frequencies	Description
210.019	No	No	19	MTWUF	19A AM
210.018	No	No	18	MTWUF	18A AM
210.017	No	No	17	MTWUF	17A AM
210.016	No	No	16	MTWUF	16B AM
210.015	No	No	15	MTWUF	15A AM
210.014	No	No	14	MTWUF	14A AM
210.013	No	No	13	MTWUF	13A AM
210.012	No	No	12	MTWUF	12B AM
210.029	No	No	29	MTWUF	29A AM
210.010	No	No	10	MTWUF	10B AM
210.028	No	No	28	MTWUF	28A AM
210.027	No	No	27	MTWUF	27A AM
210.026	No	No	26	MTWUF	26A AM
210.025	No	No	25	MTWUF	25A AM
210.024	No	No	24	MTWUF	24B AM
210.023	No	No	23	MTWUF	23A AM 🚽
4					۱.

3. It will display on the map panel and the workspace panel under the Runs in Play card.

		Runs in P	lay				^
				Reset Stop	Times	Colu	mns
🗆 Run ID	NeedEnbl	NeedUsed	Vehicle	Route	Freq	uencies	Ride
210.026	No	No		26	MT	WUF	33

4. Then select the run in the workspace panel or on the map.

Layers: O Trips 🔘 Run Masters O Run Covers			Runs	in Play			~
Edit 💿 Stops 🚱 😌 + 🔘 🕅 Runs ¼ 😒 7# 76 🔘 Opt 76 🗞 % Xfrs 🔘 🕅 🗶 🕀 🖂	-				Reset Sto	op Times 🚺     Coli	umns
Q Nazarene Christian O Jenni Amerik	Run ID	NeedE	nbl Needu	Ised Vehi	icle Route	Frequencies	Ride
Academy V Car 12 Car	210.0	)26 No	No		26	MTWUF	33
	-						
	1						
	Cancel	Apply NeedEnt	Max Loa				
The second secon			Stone On S	alastad D		_	
			stops on a	selected Rt	ins		^
Community Church						Colu	umns
S Bryant La		Stop ID	NeedUsed	School(s)	Bell Times	Frequencies	Stati
	e 210.026	Ⅲ STOP(1	No	210	7:45 AM	MTWUF	ST/
	210.026	110.143	No	210	7:45 AM	MTWUF	ST/
Ith Mills Preschool	210.026	₩ 310.367	No	210	7:45 AM	MIWUF	S14
	<sup>m'</sup> 210.026	III STOP(19)	No	210	7:45 AM	MIWUF	ST/
DARTMOUTH	210.026	₩ STOP(1	No	210	7:45 AM	MIWUF	STA
Grand Army of the P	210.026	iii 210.574	No	210	7:45 AM	MIWUF	SIA
Tucker Board	210.026	III 210.461	No	210	7:45 AM	MIWUF	SIA
Ital Associates	210.026	iii 310.370	No	210	(:45 AM	MIWUF	SIA
A tring St McCormick St Dickers Clans	210.026		No	210	7:45 AM	MTWUF,MT	STA
Bishop Stang Anytime intrass	, 210.026	III 110.112	No	210	7:45 AM	MIWUF	SIA
2 Carrolton	210.026	₩ 310.275	No	210	7:45 AM	MIWUF	SIA
Heights	g ∐ 210.026	110.114	No	210	7:45 AM	MIWUF	SIA
	210.026	iii 210.253	No	210	7:45 AM	MIWUF	STA
Leangton Ave	210.026	₩ 310.376	No	210	7:45 AM	MIWUF	ST/
the second secon	210.026	Ⅲ 110.258	No	210	7:45 AM	MTWUF,UF	S14
Transfer St. Orferences	210.026	₩ 310.276	No	210	7:45 AM	MIWUF	STA
	210.026	III STOP(23)	No	210	7:45 AM	MIWUF	SIA
Buttonwood Park Zo	210.026	₩ 110.121	No	210	7:45 AM	MIWUF	SIA
TOWN HALL	210.026	III 210.389	No	210	7:45 AM	MIWUF	SIA
Dartmouth	210.026	III Drop-Off	No	210	7:45 AM	MTVVUF,MT	
Middle School 🔻							
Ghenta Dental Group	RIO						
- W	9110						

5. To view stops on the run, select the Sel Stops button.

		Runs				^
	All	All-F	Clear	Clear-F	Sel Stops	Columns
Run ID	NeedEnbl ≡ Need	Jsed≡ V	ehicle	Route	Frequencies	Description



6. Next, select the Opt Resequence tool.



7. The confirmation window will appear. Check the Before and After information. Note: this run's duration was decreased by 3 minutes.

Confirm this c	hange?										
Resequence 1	run(s)										
Before						After					
🗆 Run	Status	Frequency	Load	Duration	Distance	🗆 Run	Status	Frequency	Load	Duration	Distance
210.026	STA	MTWUF	33			210.026	STA	MTWUF	33		
		MTWUF	33	31m 17s	6.77 mi			MTWUF	33	29m 16s	6.61 mi
					✓ Proceed	Cancel				1	Show Maps 🗸

#### 8. View the maps by clicking on Show Maps

Confirm this c	hange?										
Resequence 1	run(s)										
Before						After					
🗆 Run	Status	Frequency	Load	Duration	Distance	🗆 Run	Status	Frequency	Load	Duration	Distance
210.026	STA	MTWUF	33			210.026	STA	MTWUF	33		
		MTWUF	33	31m 17s	6.77 mi			MTWUF	33	29m 16s	6.61 mi
										_	
					✓ Proceed	Cancel					Show Maps 🗸

#### And you can compare the difference visually.



9. If you are satisfied with the change, select the Proceed button.

Confirm this c	hange?										
Resequence 1	run(s)										
Before						After					
🗆 Run	Status	Frequency	Load	Duration	Distance	🗆 Run	Status	Frequency	Load	Duration	Distance
210.026	STA	MTWUF	33			210.026	STA	MTWUF	33		
		MTWUF	33	31m 17s	6.77 mi			MTWUF	33	29m 16s	6.61 mi
					✓ Proceed	Cancel				1	Show Maps 🗸



#### **Optimize Assign**

As a user, I would like to take stop requests and assign them to the best run for better efficiency.

		Runs			^
		All All-F Clear	Clear-F	Sel Stops	Columns
⊡ Run ID ↑	NeedEnb	l ≡ NeedUsed ≡ Vehicle	Route	Frequencies	Descriptio
210.016	No	No	16	MTWUF	16B AM 4
210.017	No	No	17	MTWUF	17AAM
210.018	No	No	18	MTWUF	18A AM
210.019	No	No	19	MTWUF	19A AM
210.020	No	No	20	MTWUF	20B AM
210.022	No	No	22	MTWUF	22B AM
210.023	No	No	23	MTWUF	23A AM

n

1. Select the runs in the data panel.

2. Select the stop requests in the data panel if they do not appear automatically.

Stops										
			All All-F	Clear	Clear-F	Sel Runs	Sel Trij	ps 🛛 🛛 🕅 Colum	ns	
Stop	p ID	NeedUse	ed ≡ Type ▼	≡ Run ID	≡ Sch	ool(s) Be	II Times	E Frequencies	5	
$\Box$	140.030	No	R		21	0 7:	45 AM	MTWUF	1	
2	210.152	No	R		21	0 7:	45 AM	MTWUF		
	210.156	No	R		21	0 7:	45 AM	MTWUF		
$\square$	210.160	No	R		21	0 7:	45 AM	MTWUF		
Ø	210.373	No	R		21	0 7:	45 AM	MTWUF		
Ø	210.378	No	R		21	0 7:	45 AM	MTWUF		
V	210.379	No	R		21	0 7:	45 AM	MTWUF		
$\square$	210.380	No	R		21	0 7:	45 AM	MTWUF		

3. Then select the runs in the workspace panel or on the map.

Runs in Play									
				Reset Stop	Times	Colu	mns		
Run ID	NeedEnbl	NeedUsed	Vehicle	Route	Freque	ncies	Ride		
210.020	No	No		20	MTWU	IF	46		
🗹 📕 210.019	No	No		19	MTWU	IF	38		
210.017	No	No		17	MTWU	IF	3		



4. Select the stop requests on the map.



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5. Select the Opt Assign tool.



6. The confirmation assignment window will appear.



7. Then confirm the change by reviewing the Before and After information.

Confirm this c	hange?										
Assign 11 stop	(s) to 3 ru	n(s)									
Before						After					
🗆 Run	Status	Frequency	Load	Duration	Distance	🗆 Run	Status	Frequency	Load	Duration	Distance
210.017	STA	MTWUF	3			🗆 📕 210.017	STA	MTWUF	3		
		MTWUF	3	17m 53s	3.81 mi			MTWUF	3	17m 53s	3.81 mi
210.019	STA	MTWUF	38			210.019	STA	MTWUF	42		
		MTWUF	38	22m 43s	5.78 mi			MTWUF	42	25m 52s	6.66 mi
210.020	STA	MTWUF	46			210.020	STA	MTWUF	66		
		MTWUF	46	13m 25s	4.75 mi			MTWUF	66	21m 17s	5.69 mi
						12. 					
					✓ Proceed	Cancel					Show Maps 🗸

8. You can also Show Maps to see a visual of the change.

Confirm this c	hange?											
Assign 11 stop/	s) to 3 rur	1(S)										
rissign in stop(	o, to o fui	()))										
Before						Aft	er					
🗆 Run	Status	Frequency	Load	Duration	Distance		Run	Status	Frequency	Load	Duration	Distance
210.017	STA	MTWUF	3			C	210.017	STA	MTWUF	3		
		MTWUF	3	17m 53s	3.81 mi				MTWUF	3	17m 53s	3.81 mi
210.019	STA	MTWUF	38				210.019	STA	MTWUF	42		
		MTWUF	38	22m 43s	5.78 mi	C			MTWUF	42	25m 52s	6.66 mi
210.020	STA	MTWUF	46				210.020	STA	MTWUF	66		
		MTWUF	46	13m 25s	4.75 mi				MTWUF	66	21m 17s	5.69 mi
And Date of the second	St. Mai St. Mai Catholic Chu D Congrega Gut Rd Gut Rd	ARTMOUTH ARTMOU	Contraction of the second seco	Paths O N Marnu St William G Sunset In G S	Assters O M	O T C II Ian	d	St. Ma St. Ma Catholic Chu Congregi Gulf Rd Keybu	ry's SOUTH ARTMOUTH Nional Church PADANARAM	annon si an anno si anno si an anno si	Vanue St Willia Saroe 11 Saroe	Swift Rd Peport a map error
					✓ Proceed	C	ancel					Hide Maps 🔨

9. If you are satisfied with the change, select Proceed.

Confirm this cl	hange?											
Assign 11 stop(	s) to 3 ru	n(s)										
Before						Afte	ər					
🗆 Run	Status	Frequency	Load	Duration	Distance		Run	Status	Frequency	Load	Duration	Distance
210.017	STA	MTWUF	3				210.017	STA	MTWUF	3		
		MTWUF	3	17m 53s	3.81 mi				MTWUF	3	17m 53s	3.81 mi
210.019	STA	MTWUF	38				210.019	STA	MTWUF	42		
		MTWUF	38	22m 43s	5.78 mi				MTWUF	42	25m 52s	6.66 mi
210.020	STA	MTWUF	46				210.020	STA	MTWUF	66		
		MTWUF	46	13m 25s	4.75 mi				MTWUF	66	21m 17s	5.69 mi
						1. 9 <del>4</del>						
					✓ Proceed	C	incel				1	Show Maps 🗸

#### **Optimize Build Runs**

As a user, I would like to take a selected group of runs, the stops, and stop requests and build efficient runs.

1. Select the run(s) in the data panel.

Runs									
		All	All-F	Clear	Clear-F	Sel Stops	Columns		
Run ID 🕈	NeedEnbl =	NeedU	lsed≡ V	ehicle	Route	Frequencies	Description		
210.020	No	No			20	MTWUF	20B AM *		
210.022	No	No			22	MTWUF	22B AM		

2. Select the stop services and stop locations in the data panel.

	Stops									
			All All-F	Clear	Clear-F	Sel Runs	Sel Trij	ps     Colum	ns	
Stop	DID	NeedUse	d≡ Type	≡ Run ID	≡ Sch	ool(s) Be	I Times	E Frequencies	5	
$\square$	310.508	No	S	210.020	l.				1	
$\square$	310.506	No	S	210.020	21	0 7:	45 AM	MTWUF		
$\square$	310.326	No	S	210.020	21	0 7:	45 AM	MTWUF		
$\square$	STOP(121)	No	S	210.020	F					
	STOP(165)	No	S	210.020	21	0 7:	45 AM	MTWUF		

3. Select the runs and stops in the workspace panel or on the map.



4. Select the Opt Build Run tool.



- 5. The Configure the Run Build window will open. It will show you the data you are starting with:
  - a. Stop Services
  - b. Stop Requests
  - c. Existing Runs

Enter the max load and max duration - how you want each run built.



#### Then select Proceed.

#### 6. The confirmation will appear.

Confirm this c	hange?										
With 1 run(s) a	nd 28 stop	o request(s),	built 2	new run(s)							
Before						After					
🗆 Run	Status	Frequency	Load	Duration	Distance	🗆 Run	Status	Frequency	Load	Duration	Distance
210.020	STA	MTWUF	8			🗆 📕 OPTR	STA	MTWUF	44		
		MTWUF	8	7m 55s	2.79 mi			MTWUF	44	29m 22s	6.32 mi
						OPTR	STA	MTWUF	50		
								MTWUF	50	24m 59s	5.30 mi
WARNINGS											
2 stops were left	unassigned										
					✓ Proceed	Cancel				S	how Maps 💙

7. You can also select the Show Maps button to see the changes visually.





Check the Before and After information. If you are satisfied with the new runs, select Proceed.

8. You will see the changes on the map and the new runs will appear in the workspace panel.



Runs in Play									
				Reset Stop	Times	Colu	mns		
🗆 Run ID	NeedEnbl	NeedUsed	Vehicle	Route	Freq	uencies	Ride		
OPTRUN-1	No	No			MT	WUF	44		
D OPTRUN-2	No	No			MT	WUF	50		

#### **Optimize Transportation Needs**

As a user, I would like to create a run for Transportation Needs.

1. Once your task is created, select the school and bell time in the data panel.

	^			
		Cluster Select O	Augment Cont	ext     Columns
School	Name	Туре	Bell Time	Programs
☑ 308	Missoula Middle S	Sc ARRIVAL	8:45 AM	DFLT
4				•

2. Below, filter the home stop requests and select them in the data panel.

	Stops			^		
	All	All-F Cle	ar Clear-F	Sel Runs	Sel Trips	Columns
•	Stop ID	Home	↓	d≡ Type	≡ Run ID	≡ School(s
V	308.336	Yes	Yes	R		308
$\Box$	316.111	Yes	Yes	R		308
9	STOP(15)	Yes	Yes	R		308
V	STOP(16)	Yes	Yes	R		308
$\checkmark$	STOP(17)	Yes	Yes	R		308
V	STOP(18)	Yes	Yes	R		308
V	STOP(19)	Yes	Yes	R		308
$\checkmark$	STOP(21)	Yes	Yes	R		308
$\square$	STOP(22)	Yes	Yes	R		308
V	STOP(23)	Yes	Yes	R		308
$\checkmark$	STOP(24)	Yes	Yes	R		308
$\checkmark$	STOP(13)	Yes	Yes	S	MMS.SP.	308
	304.059	No	No	R		308

3. Then select them on the map.



4. Then select the TN Opt button.



5. Configure the TN Run Build window will open. Add the max duration and select the vehicles. Then proceed. Note: make sure the runs have Needs Enabled and the vehicles have needs added.

Co	onfigure	the TN Run Bu	uild									
Abou	it to build	runs starting with	:									
9 stop request(s), and												
0 stop service(s) from												
0 existing run(s)												
Each run built with max duration of 180					minut	es each						
Using vehicles:												
•	Vehicle	Name	Capacity	WhICh	CarSt	IntSt	SVest	Оху	StBlt	A/C	Montr	
C	BUS1	Bus 1	45	0	0	0	0	0	0	0	0	*
C	BUS2	Bus 2	75	0	0	0	0	0	0	0	0	
2	BUS3	Bus 3 - SPED	8	2	0	0	0	0	0	1	0	
C	] BUS4	Bus 4	75	0	0	0	0	0	0	0	0	
Ū	BUS5	Bus 5 - SPED	8	2	0	0	0	1	0	1	0	
2	BUS6	Bus 6 - SPED	8	2	0	0	0	1	0	1	0	Ŧ
Canada Canada												
				Proce	and the second	Gance						

6. The confirmation window will open. Select Proceed.

Confirm th	is change?										
With 0 run(	s) and 9 stop	request(s), b	ouilt 2 ne	ew run(s)							
Before						After					
🗆 Run	Status	Frequency	Load	Duration	Distance	🗌 Run	Status	Frequency	Load	Duration	Distance
						🗆 📒 OPTR	STA	MTWUF	4		
		No Rows To	Show					MTWUF	4	48m 53s	33.58 mi
						OPTR	STA	MTWUF	4		
								MTWUF	4	17m 34s	11.01 mi
WARNINGS											
2 stops were	left unassigned										
					✓ Proceed	Cancel					Show Maps 🗸

#### 7. TN Opt runs will be created.



8. In the workspace panel, select the box next to the new opt run and enable needs below.

	Runs in Play				
		Reset Stop Tim			
Run ID	NeedEnbl	NeedUsed			
OPTRUN-1	Yes	Yes			
OPTRUN-2	Yes	Yes			
۹					
Cancel Apply	NeedEnbl 🗸	Max Load			
	1111111				

- 9. To change the Run IDs, save your task and go to Data Management Runs and change the Run IDs.
- 10. To assign vehicles, make sure the runs are assigned to a route and then use the Vehicle-Route Assignments in Route Planning Operations.

To set up Transportation Needs, see the Athena Special Needs and Athena Vehicles Training Guides.