Chapter 2
Working with Field Trip Requests

When you first launch T.O.M. the T.O.M. Main Screen is displayed (Figure 2-1). On the T.O.M. Main Screen click the Work With Field Trip Requests button. The Field Trip Request Search / Selection screen (Figure 2-2) is displayed.
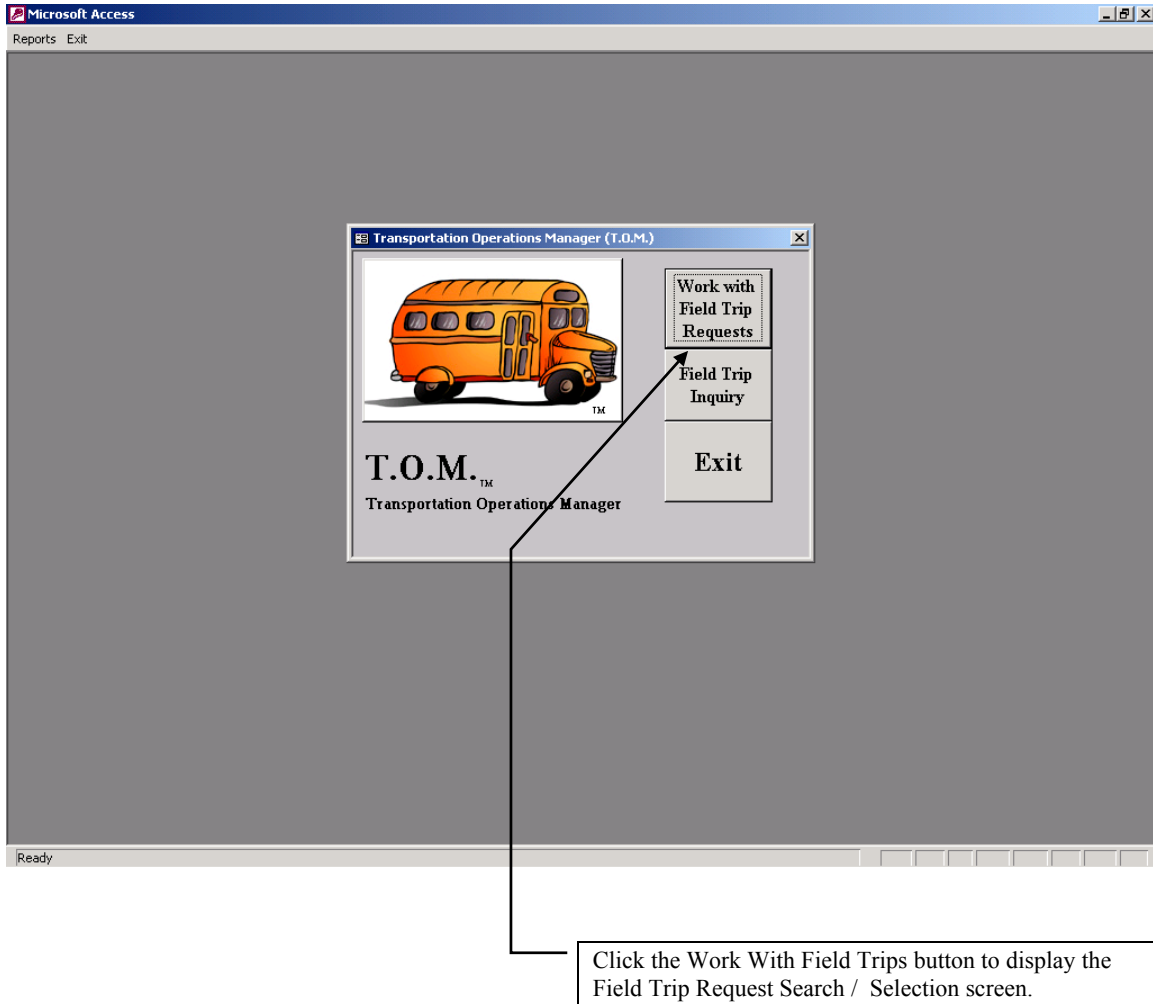

Click the Work With Field Trips button to display the Field Trip Request Search / Selection screen.

Figure 2-1. Accessing the Field Trip Request Search / Selection Screen

The Field Trip Request Screen

The Field Trip Request Search / Selection screen (Figure 2-2) displays all of the field trip requests that your school has made and that status of each request. This screen also allows you to search your field trip requests in a variety of ways.

Figure 2-2. The Field Trip Request Screen

What is a Field Trip Request?

A field trip request is a request to the Transportation Department to reserve the drivers and vehicles required to perform your school's field trip.

What Happens to a Field Trip Request After I Have Created It In the T.O.M. System?

Your field trip request is kept in a separate holding file where the Transportation Department periodically reviews field trip requests submitted by the various schools of your district. The Transportation Department can then either accept or deny your field trip request. If your field trip request is accepted, then that means your Transportation Department will perform it. If your field trip request is denied, then the Transportation Department will not perform the field trip.

How Does the Field Trip Request Search / Selection Screen Work?

The Field Trip Search Selection Screen performs two basic functions:
- It acts as a powerful search screen that allows you a wide variety of searching options to search your field trip request records.

- It allows you to add new field trip requests, change existing field trip requests and delete existing field trip requests.

Adding a New Field Trip Request

To add a new field trip request, click the New button on the Field Trip Request Search Selection screen (Figure 2-3). The Detailed Field Trip Request screen is displayed (Figure 2-4). The Detailed Field Trip Request screen uses a 'Tabbed' format. That is, the information on the screen is grouped into different sections that you can display by clicking on that group's tab.

Figure 2-3. Adding a New Field Trip Request

NOTE: All fields on the Field Trip Request Form are optional. It is up to your school and the Transportation Department to decide which information on this screen your school is *required* to enter.

The rest of this section describes each field on each tab of this screen.

Information at the Top of the Detailed Field Trip Request Screen

This information is always displayed at the top of the Detailed Field Trip Request screen (Figure 2-4).

Figure 2-4. The Detailed Field Trip Request Screen When Adding A New Field Trip Request

Status: A field trip request can have one of three statuses:

- *Pending*: The request is relatively new and has not been reviewed by the Transportation Department.
- *Accepted*: The request has been reviewed and accepted by the Transportation Department.
- *Denied*: The request has been reviewed and denied by the Transportation Department.

A new field trip request starts out with a status of Pending.

Status date / time: This is the date and time that the status was assigned to the field trip request. When the status changes the date and time of this change is displayed next to that new status.

Entered By: This is the T.O.M. Userid of the person who entered the field trip request record. This is the Userid that the person used when the logged into T.O.M. The T.O.M. security officer in the Transportation Department assigns the Userid.

Enter date / time: This is the date and time that the field trip request was entered into the computer.

The General Tab on the Detailed Field Trip Request Screen

The General tab on the Detailed Field Trip Request screen (Figure 2-5) contains general information concerning the field trip. The information on this section is usually the root or key information for a field trip request. The following is a detail description of the fields in this section:

Figure 2-5. The General Tab on the Detailed Field Trip Request Screen

Request #: *Automatically Assigned by T.O.M.* - This is the unique number assigned by the system to each field trip request. You cannot enter or change this number. The number is displayed for your reference.

Request Date: *Optional* - This is the date that you are requesting the field trip. The system automatically places the date the field trip request was entered into the computer as the request date. You may change this field. This field may be blank or must contain a valid date.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a "-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called 'masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "2000" not "00"). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix A – The Pop Up Calendar and Time Entry Screens* for more details.

Customer: *Automatically Assigned by T.O.M.* - This is the customer number assigned to your school. T.O.M. knows what school you belong to and automatically fills this number in for you. You may not change this number.

Contact: *Optional* - This is the specific person at the school that is requesting or organizing the field trip for the school. For example, the contact may be a teacher's name or a coach's name. You may enter up to 25 characters in this alphanumeric field.

Destination: *Optional* - This is the number of the destination of the field trip. Your Transportation Department has a list of all destinations that schools in your district have taken at least one field trip to. If you know the number of the destination of the field trip then enter it here. If you don't know the destination number, T.O.M. will provide an easy way to lookup your destination by the destination name (or description). To do this you simply click the Destination button. This causes the Destination Search screen to appear. See *Appendix C – Working With the Destination Search Screen* for details about searching for destinations as well as adding, changing and deleting destinations.

Fund: *Optional.* This is the fund that the field trip is charged against. If you know the number of the fund then enter it here or select it from the drop-down list. If you don't know the number of the fund click the Fund button to look up the fund by name. See *Appendix D – Searching for Funds Using the Fund Screen* for details about searching for funds.

THE DATES / TIMES TAB IN THE GENERAL TAB

The Dates / Times tab is located within the General tab on the Field Trip Request screen (Figure 2-6). The data entry fields and options are described below.

Figure 2-6.The Dates/ Times Tab on the General Tab Section

Departure Date: *Optional* - This is the date that the field trip will occur. (Or if this is a multiple day field trip this is the first date of the field trip.) If the school enters a date it must be a valid date in this field. This date will also automatically appear in the Return Date box. T.O.M. makes the assumption that the trip will return the same day that it departs. This assumption is made merely to attempt to save you the effort of entering the return date. If the return date is different then enter the different date.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called 'masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "2000" not "00"). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix A - The Pop Up Calendar and Time Entry Screens* for more details.

Return Date: *Optional* - This is the date that the trip is complete. As was mentioned in the discussion about Departure Date T.O.M. automatically assigns the Return Date with the same date as the Departure Date. This assumption is made to save you the effort of entering the return date. If the return date is different you then enter the different date.
T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called 'masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "2000" not "00"). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen click on the little button next to this date field that looks like a small calendar. See *Appendix A - The Pop Up Calendar and Time Entry Screens* for more details.

Departure Time: *Optional* - This is the time that the field trip is leaving. You do not have to enter this time. As with all time fields in T.O.M. the departure time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a departure time of 8:30 AM you need only type 0830am.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. See *Appendix A - The Pop Up Calendar and Time Entry Screens* for more details.

Arrival Time*: Optional* - This is the time that the field trip arrives at its destination. You do not have to enter this time. As with all time fields in T.O.M. the departure time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a departure time of 8:30 AM you need only type 0830am

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. See *Appendix A - The Pop Up Calendar and Time Entry Screens* for more details.

Leave Time: *Optional* - This is the time that the field trip is leaving the destination to return. You do not have to enter this time. As with all time fields in T.O.M. the departure time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a departure time of 8:30 AM you need only type 0830am.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. See *Appendix A - The Pop Up Calendar and Time Entry Screens* for more details.

Return Time: *Optional* - This is the time that the field trip is complete. You do not have to enter this time. As with all time fields in T.O.M. the Return Time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. If you are entering a Return Time of 8:30 AM you need only type 0830am.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. See *Appendix A - The Pop Up Calendar and Time Entry Screens* for more details.

Calendar button: *Optional* - The Calendar button allows you to close or warn days in the T.O.M. master calendar. See *Appendix B - Using the T.O.M. Master Calendar* for details.

THE PASSENGERS / MILES / PURPOSE TAB IN THE GENERAL TAB

The Passengers / Miles / Purpose tab is located within the General tab on the Field Trip Request screen (Figure 2-7). The data entry fields and options are described below.

# of Adults: *Optional* - This is the number of adults that require transportation for the field trip. The number of adults is used by T.O.M. to calculate the number of vehicles required to successfully perform the field trip.

# of Students: *Optional* - This is the number of students that require transportation for the field trip. The number of students is used by T.O.M. to calculate the number of vehicles required to successfully perform the field trip.

# of Handicap: *Optional* - This is the number of handicapped passengers that require transportation for the field trip. You do not have to enter this information. The Number of Handicap is used by T.O.M. to calculate the number of vehicles required to successfully perform the field trip. This is usually the number of people that are in a wheelchair and has significance to the types and number of handicap equipped vehicles required for the field trip.

Figure 2-7. The Passengers / Miles / Purpose Tab on the General Tab Section

Estimated Time: *Optional* - This is the estimated number of hours that it will take ALL DRIVERS to perform the field trip. You do not have to enter this information. You may enter both whole hours as well as portions of hours. For example, if you were going to enter an estimated hours of two and one-quarter hours you would type "2.25."

When you click the Calc button, T.O.M. calculates the estimated time based on the Departure Time, Arrival Time, Leave Time and Return Time as entered in the Dates / Times tab. The calculation is as follows: total time from Departure Time to Arrival Time plus total time from Leave Time to Return Time.

Estimated Miles: *Optional* - This is the estimated number of miles that is required to perform the field trip. You do not have to enter this information. You may enter both whole miles as well as portions of miles. For example, if you were to enter an estimated miles of 25 and 1/2 a mile you would type "25.5."

As was mentioned in the prior discussion regarding Destination Number T.O.M. automatically assigns the destination's Average Miles to the Estimated Miles. This is done to make entering field trips easier for you. You may always change this figure for each field trip.

Purpose: *Optional* - This is a further description of the field trip. You do not have to enter this information. With this field you may enter a quick description of why the field trip is being taken. For example "SEE CIVIL RIGHTS EXHIBIT." You may enter up to 25 characters in this field.

The Instructions Tab on the Detailed Field Trip Request Screen

The Instructions tab on the Detailed Field Trip Request screen (Figure 2-8) contains information for general instructions concerning the field trip. The following is a detail description of the fields in this section:

Figure 2-8. The Instructions Tab on the Detailed Field Trip Request Screen

Customer Special Instructions: *Optional* - These are any special instructions that the drivers need to know when they arrive at your site. This field is free form unlimited text. If you fill the available space in the box with instructions a scroll bar will automatically appear allowing you to scroll up and down to view and enter more instructions.   If you have any assumed special instructions in its database these assumed special instructions will automatically appear in this box when you add a new field trip request. You may then change these assumed special instructions and customize them for a particular field trip request.

Destination Special Instructions: *Optional* - These are any special instructions that the driver(s) need to know when they arrive at the destination site. This field is free form unlimited text. If you fill in the available space in the box with instructions a scroll bar will automatically appear allowing you to scroll up and down to view and enter more instructions. If the destination has assumed special instructions those special instructions will automatically appear in this box when the destination is assigned to a field trip request. You may then change these assumed special instructions and customize them for a particular field trip request.

Trip Comments: *Optional* - This comment field is used to allow you to communicate any other information to the Transportation Department about this field trip request that cannot be placed in any of the other fields on Detailed Field Trip Request form. This field is free form unlimited text. If you fills in the available space in the box with text a scroll bar will automatically appear allowing you to scroll up and down to view and enter more text. If you don't know where to enter some information about a field trip request it is always a good idea to enter it here. That way you can be sure that the information was communicated.

The Billing Tab on the Detailed Field Trip Request Screen

The Billing tab on the Detailed Field Trip Request screen (Figure 2-9) contains the P.O. #, or Purchase Order Number, that might be assigned to the field trip. Many school districts issue purchase orders for all field trips taken. This field allows you to enter the Purchase Order Number assigned to the field trip.

Figure 2-9. The Billing Tab on the Detailed Field Trip Request Screen

The Other Tab on the Detailed Field Trip Request Screen

The Other Tab on the Detailed Field Trip Request screen (Figure 2-10) contains a variety of typically non-critical information concerning a field trip. When the school was entering the field trip request all fields in this section were visible and available for the school to enter.

Figure 2-10. The Other Tab on the Detailed Field Trip Request Screen

Internal Field Trip Number: *Optional* - Many times school districts have preprinted pre-numbered Field Trip forms. They use the preprinted number on the form to track the field trip throughout the district. This field is where you would put that number. This number is 30 characters alphanumeric.

Field Trip Category: *Optional* – Your Transportation Department may have created a list of categories that you can assign to field trips. Categories can for example group field trips that are for the same activity (Girls Basketball). This category can then be used later to search for field trips or to produce management reports for those field trips. To view the list of categories that your Transportation Department has created click on the down arrow to the left of the Field Trip Category field. When this is done a drop down list of all the categories that the Transportation Department has created will appear. To choose one of these categories from the list just click on it and that category will automatically be placed in this field.

Grade: *Optional* - You can (if you choose to) specify what grade is taking this field trip. You may then later search on field trips with a certain grade assigned to them. To view the list of grades that you may choose click on the down arrow to the left of the Grade field. When this is done a drop down list of all the grades that you may choose from will appear. To choose one of these grades from the list just click on it and that grade will automatically be placed in this field.

Approval Path: This field is not used by the school version of T.O.M. It is used by the T.O.M. extension WebTrips which like the school version of T.O.M. allows schools to enter trip requests electronically only it does this using the Internet.

Trip Requestor Email: This is one of the three Email addresses that T.O.M. allows you to set for a field trip. This Email address can be *stamped* on any new field trip or field trip requested entered into T.O.M. from the customer defaults. This Email address is used by T.O.M. to automatically send emails to people when key events to a field occur.

Trip Approver Email: This is one of the three Email addresses that T.O.M. allows you to set for a field trip. This Email address can be *stamped* on any new field trip or field trip requested entered into T.O.M. from the customer defaults. This Email address is used by T.O.M. to automatically send emails to people when key events to a field occur.

Trip Administrator Email: This is one of the three Email addresses that T.O.M. allows you to set for a field trip. This Email address can be *stamped* on any new field trip or field trip requested entered into T.O.M. from the customer defaults. This Email address is used by T.O.M. to automatically send emails to people when key events to a field occur.

Saving Your Field Trip Request

After you have entered all of the information for a new field trip request just click on the OK button in the Detailed Field Trip Request screen and the field trip request will be saved and you will automatically be returned to the Field Trip Request Search / Select Screen (Figure 2-2).

Changing an Existing Field Trip Request

To change any information on an existing field trip request you first select the field trip request that you want to change (as shown in Figure 2-11) and then click the Edit button. The field trip request you selected is retrieved by T.O.M. and displayed in the Detail Field Trip Request screen (Figure 2-12).

Figure 2-11. Selecting a Field Trip Request to Change

From the Detail Field Trip Request screen (Figure 2-12) you can make the desired changes to the field trip request and then save your changes. The Detailed Field Trip Request screen uses a 'Tabbed' format. That is, the information on the screen is grouped into different sections that you can display by clicking on that group's tab. Refer to *Adding a New Field Trip Request* previously in this chapter for complete descriptions of each tab and the data entry fields it contains.

When you have finished changing the field trip request, click the OK button to save your changes. The Field Trip Request Search / Selection screen (Figure 2-11) will again be displayed.

Figure 2-12. Retrieved Field Trip Request Displayed in the Detailed Field Trip Request Screen

Changing an Accepted Field Trip Request

? WHAT HAPPENS IF I TRY TO CHANGE A REQUEST THAT HAS BEEN ACCEPTED?

T.O.M. won't let you. After a field trip request has been accepted by the Transportation Department, it becomes a *field trip* in the Transportation Department's field trip database and the Transportation Department no longer needs to review your field trip request information.

School's Field Trip Requests	▪ ▪ ▶ Accepted Field Trip Requests	Transportation Department's Field Trip Database
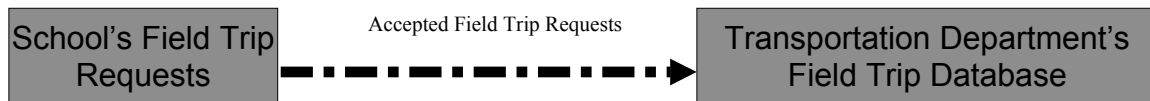
If you need to change some information on a field trip request after it has been accepted in T.O.M. by the Transportation Department you must then contact the Transportation Department and tell them the changes in your field trip request. When you click on a field trip request that has been accepted and click the Edit button, T.O.M. will display the accepted field trip request on the Detail Field Trip Request screen in *Inquiry Only Mode*, which means you can see the information but you cannot change it. On this screen you will see the number of the field trip that was created when this request was accepted. If you click on this number, T.O.M. will display the actual field trip record in the Transportation Department's Field Trip Database in *Inquiry Only Mode* (Figure 2-14).

First click on the desired accepted field trip request.

Then click the Edit button to view the accepted field trip request on the Detail Field Trip Request screen.

Figure 2-13. Attempting to Edit A Field Trip Request That Has Already Been Accepted

Figure 2-14. An Accepted Field Trip Request as it is Displayed in the Detail Field Trip Request Screen

Figure 2-15. Actual Field Trip in Transportation Department's Field Trip Database
Created by Accepted Field Trip Request

Changing a Denied Field Trip Request

? WHAT HAPPENS IF I TRY TO CHANGE A REQUEST THAT HAS BEEN DENIED?

T.O.M. will let you change a field trip request after the Transportation Department has denied it. A typical example of how this would work is when the Transportation Department refuses a field trip request explaining that the date you requested has no vehicles available due to other field trips already requested. In this case, you can change the date of the denied field trip resubmitting it based on the changed date.

NOTE: Once the field trip request has a status of 'Denied' that status will not change unless the Transportation Department later accepts it. Consequently if you have changed a denied field trip request and you want the Transportation Department to review the request for accepting you must contact the Transportation Department and let them know that you have changed this request.

To change a denied field trip request find that request in the list of field trip requests found in the last search. Click on that field trip request and click the Edit button (Figure 2-16). This will cause the denied field trip request to display in the Detailed Field Trip Request screen (Figure 2-17). You will notice that the request's status is now 'Denied' and you will see that the request was denied. You will also see a new field called 'Comment From Trans. Dept.'. This is a brief comment given by the person by the Transportation Department telling you why the field trip request was denied. From this screen you can make your changes to the field trip request.

First click on the denied field trip request you wish to view / change.

Then click the Edit button to view the denied field trip request on the Detail Field Trip Request

Figure 2-16. Selecting a Denied Field Trip Request to Change

Figure 2-17. Viewing a Denied Field Trip Request in Detail Field Trip Request Screen

Deleting an Existing Field Trip Request

T.O.M. allows you to delete a field trip request that you have previously entered and saved. **NOTE:** You may NOT delete a field trip request that has been previously accepted by the Transportation Department. If you attempt to delete an accepted field trip request T.O.M. will display a message screen telling you that you may not delete an accepted field trip request (Figure 2-18).
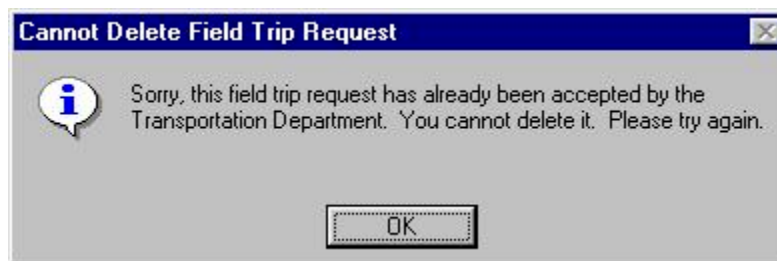

Figure 2-18. Message Screen From T.O.M. Telling You That an Accepted Field Trip Request May Not be Deleted

To delete an existing field trip request find that request you first find and the field trip request that you want to delete and click on it to select it (as shown in Figure 2-19) and then click the Delete button.
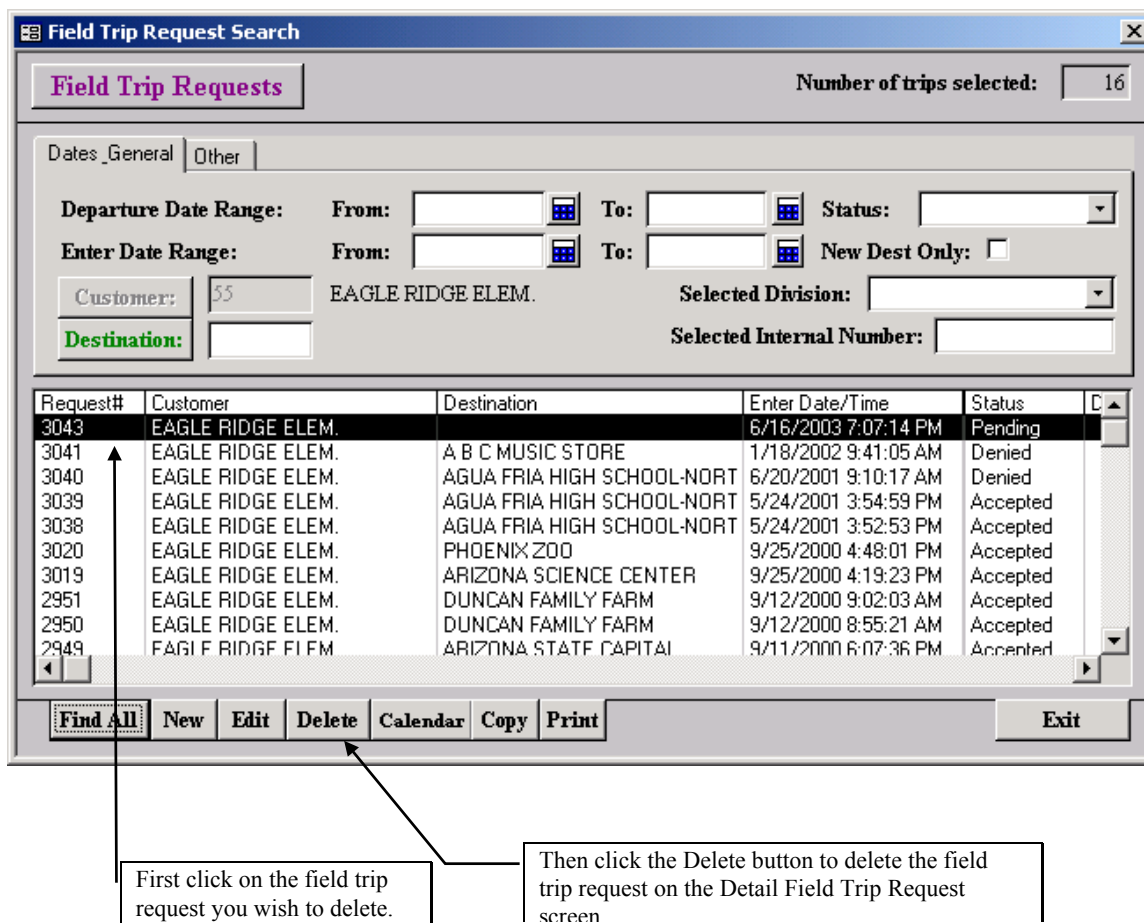

Figure 2-19. Selecting a Field Trip Request to Delete

T.O.M. will display a message asking you to confirm that the field trip request is to be deleted (Figure 2-20). Once you confirm this deletion the selected field trip request will be removed from your field trip request database.
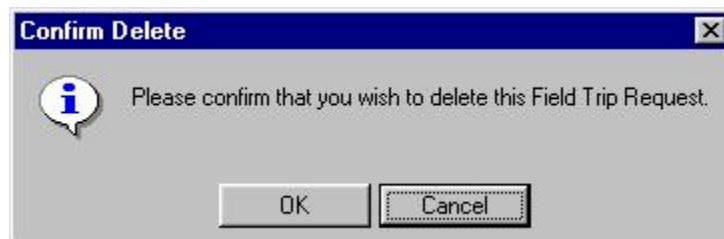

Figure 2-20. Message Screen Asking You To Confirm That You Wish To Delete the Selected Field Trip Request

Copying a Field Trip Request

Entering new field trip requests can be a time consuming, tedious process. T.O.M. tries to ease this job using two strategies:

- Making the data entry of a new field trip requests quick and easy using default values, *drop down* list boxes and pop up search screens.
- Allowing you to quickly create a new field trip request by *copying* a similar existing field trip request.

The Copy field trip request function is a quick and easy way to add a new field trip request into T.O.M. For example if your school, Echo Mountain Elementary School has taken a trip to the City Zoo and you are once again requesting a field trip to the City Zoo you can simply find the last trip you took to the City Zoo and *Copy* it to create the new field trip request to the City Zoo. Let's look at an example of creating a new field trip request by *copying* a similar existing field trip request.

In this example the school Eagle Ridge Elementary School will be taking a field trip Duncan Family Farms on 10/25/2003. We searched through our list of field trips for all field trips taken by Eagle Ridge Elementary School to Duncan Family Farms (Figure 2. 21). To make a copy of one of these field trips, click on the field trip in the list of field trips and click the Copy button. The Copy a Trip Request Screen Displays (Figure 2. 22). The Copy a Trip Request screen allows you to what the Departure and Return dates for your new field trip request will be. Once you have entered your new date simply click on the Copy Trip button. A NEW field trip identical to the selected field trip is displayed in the Detailed Field Trip request screen (Figure 2. 23).

Figure 2. 21- Selecting a Field Trip to Copy

Figure 2. 22 – The Copy a Field Trip Screen

Notice how you can select a field trip request that has already been accepted and yet your new field trip request has a status of Pending. The copy trip request feature will create a new trip request with the status of pending no matter what the status of the original field trip request was. The new field trip request has a request date of the date that you created it using the copy trip feature yet it's departure and return dates are

set to the date you entered in the Copy Trip Request screen. Besides these differences the new trip request is identical to the original field trip request. It's that easy!

From here you can make the desired changes to the Field Trip Request. Click the Save button at any time to save the field trip request information without closing the screen. To save and close the screen, click OK. The Field Trip Search / Select Screen (Figure 2. 21) will again be displayed.

Figure 2. 23 - New Field Trip Created by Copying A Previous Field Trip