T.O.M. WebTrips Implementation Package

Transportation Operations Manager (T.O.M.)

A Quality Gecko Microsolutions' Product.

T.O.M. WebTrips Implementation Package

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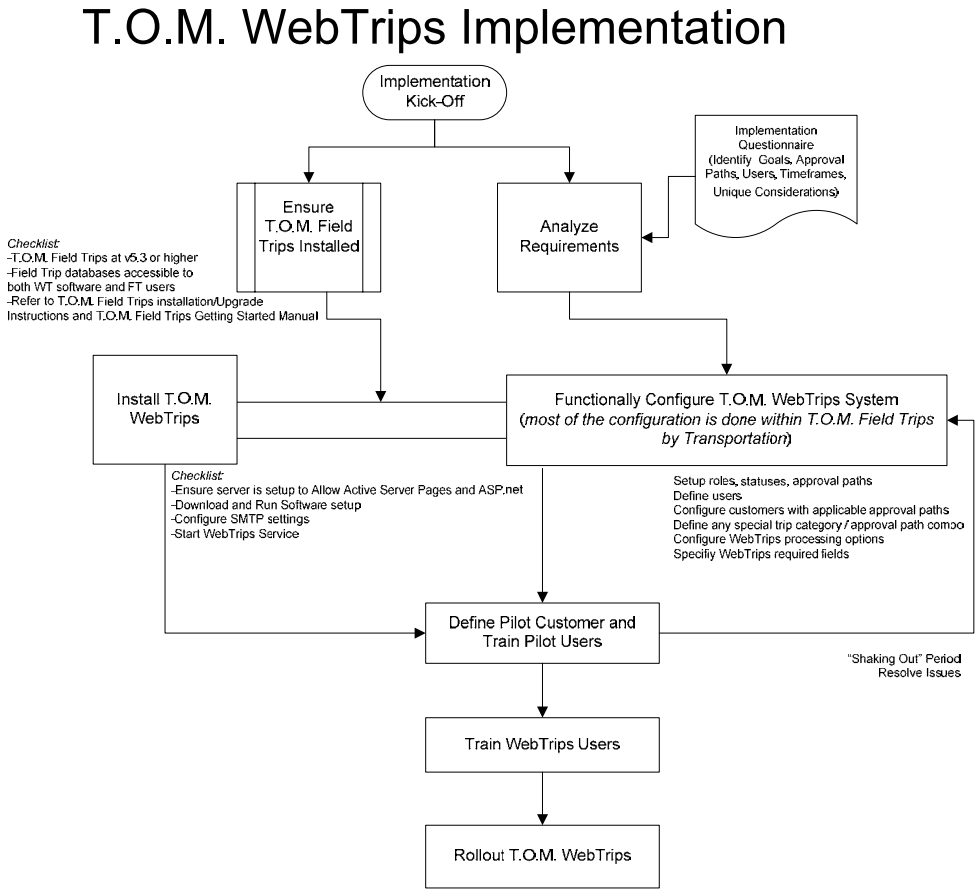
T.O.M. WebTrips Implementation

This document is meant as a guide to implementing T.O.M. WebTrips, it does not include the technical instructions for installing T.O.M. WebTrips or T.O.M. FieldTrips, it is meant as a planning guide for the software implementation. Please refer to the Software Product Manuals or external documents for detailed installation instructions.

T.O.M. WebTrips – An Overview

Welcome to T.O.M. WebTrips! The T.O.M. WebTrips Software allows your schools to enter in Field Trip requests online. WebTrips will reduce or eliminate the paperwork tied to field trip requests. Generally, it runs on the district's server, you host the application on your hardware, and your schools access the software over the intranet via a browser. From any machine out at the school (MAC or PC) users can pull up WebTrips, login, and submit a trip request. No application software needs to be installed on the machines out at the school. WebTrips uses the same databases as your T.O.M. Field Trips software, T.O.M. WebTrips works in conjunction with T.O.M. Field Trips, it does not take the place of T.O.M. Field Trips.

The T.O.M. WebTrips software allows you to build approval paths for field trip requests. When a request comes in, the software will notify (email) the person who is responsible for approving this type of trip and will not send it to Transportation until it has been approved. You can setup the approval path to include as many approval levels as required and you can have different approvers depending on the type of trip (e.g. regular curriculum trips have to be approved by the principal but athletic trips need to be approved by the athletic director).



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T.O.M. WebTrips Implementation

Implementation Questionnaire

Information from the following questionnaire will assist in the functional configuration of T.O.M. WebTrips.

Approval Paths

Identify what, if any, approval paths you will be using.

1. Who needs to approve the trip requests?
2. Does it depend on the type of trip?

   For example does the campus Principals approve regular curriculum trips but athletic trips require approval by the Athletic Director?
3. What about out of town trips or overnight trips?
4. What are all the different types of trips that may require approval by different people?
5. Will different schools require different approval paths?

Users

Identify who will be creating new requests and who will be approving requests.

1. Who will be entering trip requests into WebTrips? Will you distribute the task to the individual teachers or centralize it so that one or two users at each school are responsible for entering trip requests? If you are using approval paths, we generally recommend requestors be given a generic “school” username. This way multiple people from a single school can request a trip without having to manage multiple usernames.
2. Who will be approving the trip requests in the system? This person will receive an email by the system letting him/her know there is a trip request awaiting his/her approval. Will it be the Principal or a delegate? You will need to know the email addresses of each approver.

Trip Request Form

Determine how the trip request form, the webpage that is filled out by the users, should behave.

1. What fields do you absolutely want the user to fill in? The system allows you to specify the required fields and will not save a request unless these are filled in.
2. Does each school have a set of specific funds they use? If you want to prevent them from selecting any fund outside of this set, you may do so but you will have to identify and setup the approved fund list.

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3. Do you have a policy where Field Trip Requests must be submitted a specified number of days before the departure date? WebTrips allows you to give the user a warning if they try to put in a request that violates your lead time. WebTrips can either provide a warning and still save the trip or prevent the trip from being saved.

4. T.O.M. Field Trip's master calendar is shared with WebTips users. The master calendar can be configured to show the number of vehicles reserved for field trips on each day. Is this something you will want the software to calculate and display on the calendar? Do you want the software to prevent a trip request from being entered if there are already too many trip buses reserved for that day?

Rolling-Out WebTrips

1. When do you want to have WebTrips up and running at all schools?
2. What school(s) will be your pilot users?
3. How long do you want to operate pilot before rolling out to other users?
4. How will you make WebTrips available to users? Your District's technology department should be able to create a link to WebTrips off any District website employees are already using.
5. How will you train your WebTrips users?
    a. Develop/Customize Training Materials
    b. Train the school's main users or "Power Users" and if tat each school (those people who will be entering the most field trips, these are called "Power Users")Identify the main users at each school
    c. Visit each school and conduct training session
    d. Include training in back-to-school orientation

T.O.M. WebTrips Implementation

End-User Training

Who should be Trained

Gecko purposefully designed the WebTrips software so that entering a trip request is very simple and straight forward. However, it is still important to provide training and support to your end-users. Gecko recommends identifying and training the power users at each school and any district-wide power users. Power users are those who use the software most frequently. Train the power users, then they can be responsible for supporting and training other users at their location.

Ensure Training is Pertinent and Timely

It is important that users train on the software just before they are expected to use it and that the training be specific and applicable. The training materials and training sessions should be customized to include:

- How will the users launch WebTrips (what is the District's URL or where is the WebTrips link)?
- What fields are required when submitting a trip request?
- What are the District policies for departure date lead-time and number of trips allowed on specific day?
- What is the approval process?
- What other policies or procedures surround submitting trip requests?
- How can a user tell if a trip request has been approved or accepted by transportation?
- How does a user submit changes to a trip once it has been accepted?
- How would you like a user to communicate specific trip details (i.e. multiple pickup locations, multiple destinations, etc.)

Gecko's Support of End-User Training

Gecko provides various support options for end-user training. Pricing for these options are below in the Gecko's Customer Service – Training & Support Options section. These support options include:

- Developing end-user training materials
- Consulting with District on content of end-user training sessions
- Delivering on-site training to the end-users. On-site training can either be:

  Sessions at Individual Schools

  Centralized Sessions with multiple school representatives

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T.O.M. WebTrips Implementation

T.O.M. WebTrips Technical Information and System Requirements

Workstations (Users out at the schools entering trip requests)

- Web Browser software (Microsoft Internet Explorer v6.0, or higher, other browsers also supported)

Web/Application Server

Required

- Windows XP Professional, Windows 2000, or Windows Server 2003
- Microsoft Internet Information Server (IIS) version 5.0 or later
- Speed and RAM configuration dependent on expected database size and web traffic:
  800 MHz (or higher)
  256 MB RAM
- 500 MB available space
- CD-ROM drive
- 10/100 network adapter card
- LAN connectivity to T.O.M. field trip databases (or reside locally)

Recommended

- Windows 2000 Server or Windows Server 2003
- Microsoft Internet Information Server (IIS) version 5.0 or later
- Speed and RAM configuration dependent on expected database size and web traffic:
  1.6 GHz Pentium-class processor or above
  1 GB RAM
- 1 GB available hard disk space
- CD-RW
- 10/100 network adapter card
- LAN connectivity to T.O.M. field trip databases (or reside locally)

Note: WebTrips 2.0 contains components written in Microsoft's .NET framework (v1.1). If not already on the machine, the T.O.M. WebTrips 2.0 software installation will install .NET Framework 1.1 Redistributable and all required components (IE 5.01 or later, MDAC 2.6 or later, etc.). The WebTrips 2.0 software installation will allow you to exclude .NET components during the installation. If .NET components are excluded the .NET Framework 1.1 is not required and will not be installed.

Windows Server 2003 must be configured as an application server with ASP.net installed and to allow Active Server Pages (in Add/Remove Windows components, Appication Server, Internet Information Services, World Wide Web Services).

The above system recommendations are general and you may have optimal performance with hardware that is different than what is referenced. Network connection speed, traffic, T.O.M. database size, and other items may be a factor when evaluating performance.

WebTrips Email Configuration

Various functions in the T.O.M. Field Trip and T.O.M. WebTrips Software will trigger an email, generally letting the trip requestor or the approver know about the trip. The T.O.M. Software does not act as an independent email server, it sends an email request to your District's SMTP server. In order to send the request successfully the applications need to be made aware of you District's SMTP settings.

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Depending on where the trip or trip request is in the "life-cycle" the T.O.M. Software emails through two different applications 1-T.O.M. WebTrips running on the IIS web server and 2-T.O.M. Field Trips running on the client computer (machines within transportation). The email settings need to be defined on each machine respectively.

1- WebTrips... The email settings are defined during the installation of the application, if they need to be defined later or changed the settings are held in the trip.ini file on the server. This file can be edited in any text editor (Notepad). The trip.ini file resides by default in the "C:\TOM\" directory, one layer above the WebTrips application diretory. The following settings are found in the [T.O.M. Options] section at the bottom of the trip.ini and should be changed to reflect your district:

SmtpServer=<<*email servername or IP address*>>
SmtpPort=25
SmtpAuthentication=FALSE
SmtpUsername=Username
SmtpPassword=Password
EmailFromName=Transportation Field Trips Administrator
EmailFromAddress=<<*a valid email address on your server*>>

Notes: The SmtpPort should be changed if your SMTP server is setup to use a non-standard port. If your SMTP server is setup to require authentication, set SmtpAuthentication to TRUE and supply a valid SmtpUsername andSmtp Password.

2- T.O.M. Field Trips... These settings are held on each T.O.M. Field Trip user's workstation (usually the users within transportation) and can be changed through the application. To set up the email settings on the workstation go to File, Other, District Options, and click the button Email Options, then Email Settings at the bottom of the window.

WebTrips Service

The WebTripsService (or WebTrips 2.0 Totaller Service) is a windows service that periodically calculates the number of busses scheduled or requested by day. It is listed as a separate component in one of the dialogs during the T.O.M. WebTrips installation and it is required when a district wants to use the following features in T.O.M. WebTrips:

-Show the number of busses (or trip slots) on the Calendar in WebTrips

-Provide a warning (either hard or soft) when a Trip Request is entered in WebTrips that will put the number of busses at or beyond a specific number for that day (for instance your district only has 25 activity busses and you will only allow 25 field trip busses to go out in a day, if you already have 25 busses scheduled or requested for 5/1/09, then users who request a trip for that day will get a message letting them know the day limit has been reached, they message can be set up to prevent them from saving the trip or simply letting them know that it may not be granted by transportation. You can set up the day limit.

Generally it is best to install this service, the setup does not turn it on automatically because some of our customers don't care at all for this functionality. If users want it they have to start the service and set it up to run automatically. Please see the detailed install instructions for more information.

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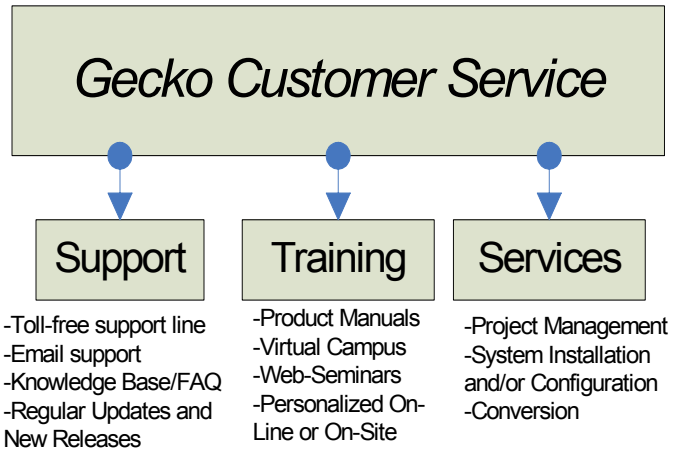
Gecko's Customer Service – Training & Support Options

Gecko is committed to excellent customer service. Training offerings, technical support and service packages have been designed to help you succeed.



Gecko's Training Philosophy

Gecko strongly embraces a "blended learning" approach to client training. Blended learning combines a variety of training methods, including instructor-led training, web-based training and documentation to ensure maximum effectiveness by giving customers exactly what they need, when they need it.

Gecko's blended learning options may include:

Instructor-Led. Instructor-led courses offer a thorough overview of product features and students learn and practice product functions that directly relate to routine work tasks. In web-seminars users can ask for clarification, obtain troubleshooting tips and hints, and request more in-depth knowledge about product functions and features. Instructor-led training may be in one or more of the following forms:

- Traditional classroom
- Web-seminars
- Online coaching/mentoring
- Personalized, Customer Designed On-Line or On-Site Training

Self-Paced Learning. Self-paced web-courses in Gecko's Virtual Campus provide both comprehensive training and overview tutorials. The videos simulate using the T.O.M. software in a variety of scenarios from the very basic to more advanced, multi-step processes and can be used as a prerequisite for instructor-led classes, to introduce new material or as review/reference material.

- Web-Based Training
- Manuals, product documentation
- Online resources

Gecko uses a variety of tools and technologies in the delivery of our blended training approach, including: Web Conferencing, Flash Videos, Tele-Conferencing, and EMAIL.

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Training Options

Training on T.O.M. WebTrips software is provided by Gecko Microsolutions either through content specific web-based seminars or personalized on-line or on-site training.

Training Offerings	Costs
Web-based Seminars	$99/session - Some courses are more than one session, see list of training offerings for details.
T.O.M. Field Trips and WebTrips Foundation Refresher Package	$750 – Generally 4-6 online sessions
T.O.M. WebTrips Training Package*	$450 – Generally 2-3 online sessions
T.O.M. WebTrips End-User Training	$95/hour (1/2 hr minimum billing increments)
Personalized On-Line Training	$95/hour (or flat fee for ½ day, full day.)
Personalized On-Site Training	$899/day plus trainer's expenses (minimum 1 day)

*Generally with the WebTrips Training Package the District not only is trained on configuring WebTrips but they also walk away with the required setup complete for the Pilot Customer.

Gecko's Support Policy

Gecko is committed to servicing our customers. We staff a traditional technical support phone line and use some of the latest advances in technologies to help us help you, no matter where you may be.

- Multiple Contact Options — online, email, or phone
- Newsletter
- Self-Service Options, including Customers Only Web Page
- Web Conferencing allowing us to not only to better understand the problem you are having but to actively participate in finding the resolution
- Regular updates, patches, new releases

Contact the technical support team:

E-Mail Technical Support E-mails submitted to our support staff will be responded to within 24 hours.	support@geckoms.com
Phone Technical Support Gecko's phone support line is available from 8:00am-5:30pm MST (Arizona time).	1-800-390-7520, ext 1

Training will not be offered on the technical support line, for a complete list of Gecko's training offers, please see the training section above.

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Service Options

Typically when implementing WebTrips the District is responsible for managing the implementation, installing the software, configuring the system and training the end users. However, Gecko Microsolutions offers several packaged service options should the District choose to outsource some of these tasks.

Additional Service	Costs
Installation Services – Gecko will install and test the installation of the WebTrips application*	$380
Import Users – Gecko will import and configure District's Webtrip's users**	$160
WebTrips Configuration – Gecko will setup the applicable WebTrips processing options, users, and approval paths according to the District's implementation goals	$350
Customize WebTrips Trip Request Form	Depends on scope of client's project.
Develop customized End-User Training Materials including documentation that can be linked to the WebTrips login page and a "How-To" Video	$250

*District's IT department must provide appropriate permissions and setup district's DNS so that the T.O.M. WebTrips application is accessible.

**District must provide source information

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Sample Implementation Plan

		Responsible	Duration
Implementation Kick-Off			
	Meeting with Gecko to Kick-Off Implemenation	**Gecko & District**	**1 hr**
	Implementation Questionairre	District	1 hr
	Approval Paths		
	Users		
	Trip Request Form - Processing		
	Technical Configuration	District IT	.5 hr
	T.O.M. Field Trip Software (Existing/New? Database location, FT Version)		
	System Requirements		
	Email Parameters		
Install WebTrips Software		District IT	2 hr
	Ensure T.O.M. Field Trips databases are accessible and at v5.3+	District IT	
	Install WebTrips Software on the server	District IT	
	Configure Email Parameters	District IT	
	Start WebTrips Service (if applicable)	District IT	
	Test Installation (including email and calendar)	District IT	
Configure WebTrips			
	Meet with Gecko to Discuss Configuration & Approval Paths	**Gecko & District**	**1 hr**
	Setup WebTrips Processing Options	District	0.25
	Setup WebTrips Required Fields	District	0.25
	Setup Approval Paths (Roles, Statuses, Approval Paths)	District	0.25
	Setup & Test Pilot Customer	**Gecko & District**	**2 hr**
	Setup Users for Pilot		
	Configure Customer to use appropriate Approval Path(s)		
	Internal walk-through of Trip Request-Approval-Accept Process		
	Test specific scenarios (required fields, limit customer funds, closed dates, departure date leadtime, # trip reservations)		
	Monitor trip request's status in WebTrips		
	Lookup changes to Field Trips in WebTrips		
	Train Pilot Users	District	1 hr
	Roll-out WebTrips to Pilot Customer	District	
	Run WebTrips with Pilot Customer	District	**Approx 1 month**
	Setup Remaining Users	District	.5 hr
	Setup Remaining Customers	District	.5 hr
Train WebTrips Users			
	Identify Trainer - who will be responsible for end-user training	District	
	Prepare/customize training materials	District	**2 - 4 hrs**
	Plan End-User Training		
	Identify "Power Users" at each school (most frequent users of WebTrips)	District	0.25
	Determine the number of training sessions and training location		
	Go out to each school and train Power Users	District	.75 * Number Schools
	Train Power Users in a centralized facility		.75 * Number Sessions
Roll-Out WebTrips			
	Create a link to WebTrips off District site (or distribute WebTrips url)	District IT	
	Let users know to begin using WebTrips	District	