

Chapter 4

Entering a Field Trip Request

A valid user can enter field trip requests in WebTrips with access to your district's intranet or the Internet. Usually the user is associated with a single school such as an administrative assistant or a teacher. As long as the user has been created in T.O.M., WebTrips will guide them through creating a request, let's see how!

This chapter describes how to:

- Login to the WebTrips application as a school user
- Create a new trip request
- Create a new destination
- Logout of the WebTrips application



① T.O.M. Tip

WebTrips Users – Individual or Generic

WebTrips users must have a Username and Password to log into WebTrips. T.O.M. usernames and passwords are **not** case sensitive. For more information on setting up T.O.M. users please see *Chapter 9: Security of the T.O.M. Getting Started Manual*.

WebTrips users can be set up for every individual that will enter trip requests or a generic user may be set up for data entry at each school. Generic school users would simplify the user set up and may make it manageable for even the requesting teacher to enter in his or her own field trip request. If approval is required on field trip requests, the approvers can be set up with unique usernames and passwords. By enforcing approval paths where appropriate and requiring the transportation department to ultimately accept every field trip request, T.O.M. WebTrips preserves the integrity of the trip request process while potentially eliminating the paperwork and reducing the opportunity for data entry error.

Logging in to WebTrips as a School User

To login to the WebTrips application, you should have already obtained your Username and Password and the web address for your local WebTrips page from your T.O.M. administrator. Check with your T.O.M. administrator if you do not already have this information.

1. Launch your browser application (usually Internet Explorer or Netscape).
2. Point your browser to the WebTrips website given to you by your T.O.M. Administrator. The WebTrips Login page is displayed (Figure 4-1).

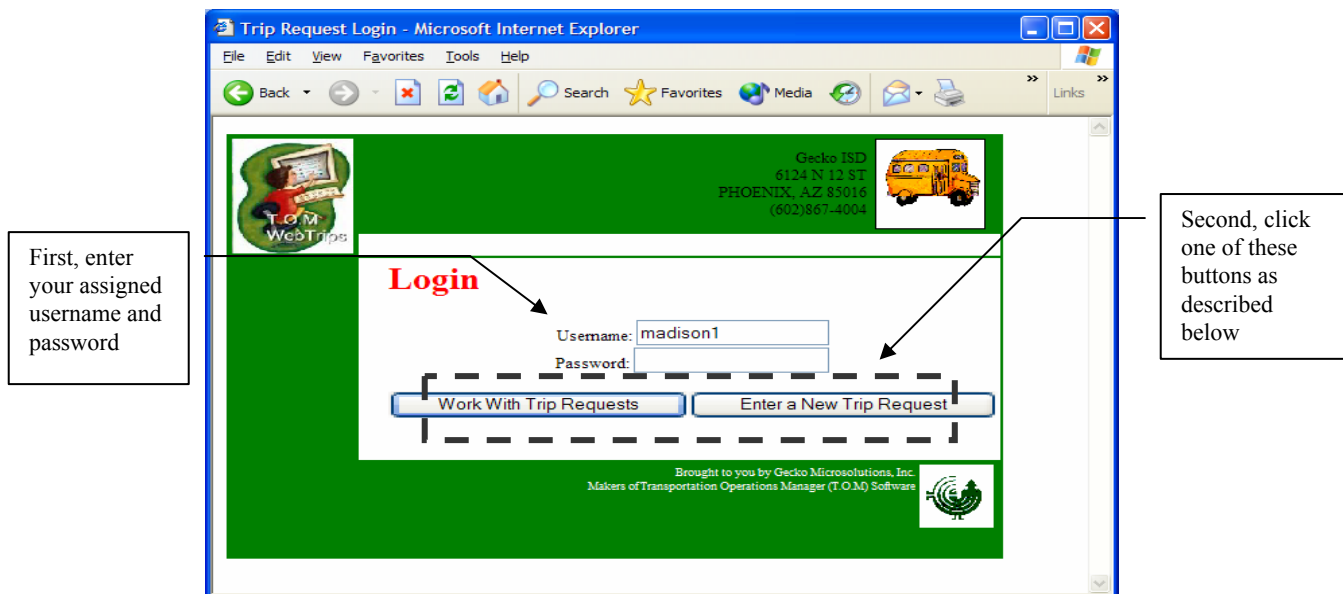


Figure 4-1. The WebTrips Login page

3. Enter your username in the Username field.
4. Enter your password in the Password field. (Your password will not be displayed.)
5. You can do one of the following:
 - To work with existing trip requests including searching for trip requests, click the Work With Trip Requests button.
 - To enter a new trip request, click the Enter a New Trip Request button.

Note: To follow the descriptions in the next section, please click the Enter a New Trip Request button.

WebTrips validates your username and password against the user database and (if accepted) displays the Request Detail page (Figure 4-2). If the username and/or password are not valid, WebTrips displays an error message. Click your browser's Back button and re-enter the username and password.



Entering a New Field Trip Request

When you select Enter a New Trip Request, the Trip Request Detail page is displayed (Figure 4-2).

Enter trip information in the appropriate fields to submit your trip request for approval.

Figure 4-2. The Field Trip Request Detail page

This page allows you to enter the trip information and submit it for approval. The Request Detail page consists of the following sections:

- District information, trip status and navigational buttons shown at the top of the page
- General information: trip request date, customer, contact, destination and fund
- Field trip dates and times
- Customer and destination instructions, field trip comments
- Billing information
- Other information: internal field trip #, trip category and grade



Information at the Top of the Request Detail Page

Figure 4-3 shows an example of the top of the Request Detail Page. This information is always displayed at the top of the page. Below Figure 4-3 is a detailed description of the elements of this section of the page.

Figure 4-3. Information Displayed at the Top of the Request Detail page

Field	Description
Notes from Transportation Department	The Transportation Department may enter a note or comment to communicate pertinent, timely information to WebTrips users. All users see this note when they enter the Request Detail page. This comment can be changed in the district options in the T.O.M. Field Trip software. See Appendix C - Specific WebTrips Options in T.O.M. Field Trip Software .
District Information	The school district name and address are displayed on all WebTrips pages. The district information is held in the T.O.M. database, under the district options. Note: The district's logo is retrieved from a file called DISTLOGO.BMP stored on the web server in the WebTrips application, in the \images\ subdirectory. See Customizing Your WebTrips Web Pages in Chapter 1 – Installing T.O.M. WebTrips Software of this manual.
Navigation Buttons	The navigation buttons allow you to open other pages within WebTrips. You can go to the trip request search page by clicking the Work with Trip Requests button, start a new trip request with the Enter New Request button, inquire on existing field trips with the View Field Trips button or log out of WebTrips with the Log Out button.
Trip Request Status	The system assigns the trip request status. If you are a school user and the school has an approval path, the first status is set to UNAPPROVED. If the school is not on an approval path, the status is set to PENDING.



Field	Description
	<p>The PENDING status marks the trip request as being turned over to the transportation department. In the T.O.M. Field trip software the transportation department can either accept the request and turn it into a field trip (status would be changed to ACCEPTED) or deny the trip request (status changed to DENIED).</p> <p>If the trip request is on an approval path, the status is changed at each level when it is approved or denied.</p>
Status Date / Time	The date and time the current status was assigned to the field trip request. When the status changes (i.e. when the request is approved or denied by an approver or by the transportation department) the new date and time is displayed next to the new status.
Entered By & Entered By Date / Time	The system tracks the T.O.M. username that initially created the trip request and the date it was created. The T.O.M. security officer in the Transportation Department assigns the Username.

Information in the General Section of the Request Detail Page

The General section on the Request Detail page (Figure 4-4) 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.

Trip Request Detail - Microsoft Internet Explorer

Entered by: madison1 7/17/2002 2:50:45 PM

General

Request #: 23

Request Dt: 7/17/2002 2:50:45 PM

Customer: 1, Madison #1

Contact: Debbie Williams

Destination: 191, Bank One Ball Park

Fund:

Dates/Times

Departure: Oct 10 2003

Return: Oct 10 2003

Depart Time: 7:00 am

Arrival Time: am

Leave Time: am

Return Time: 6:30 am

Pass

of A:

of Stud:

Wheel:

Est T:

Est M:

Purp:

Instructions

Customer Special Instructions:

Figure 4-4. Information in the General Section of the Request Detail Page

The system requires very little information to be put in before a trip request can be saved. However, the transportation department may develop a policy on what information it requires from the school before accepting a field trip request. If you are unsure of what information to fill in, please check with your T.O.M. Administrator.



Field	Description (required fields in gray; all others are optional)
Request #	The system assigns a unique number for each field trip request.
Trip Request Date	The system assigns the date the trip request was entered.
Customer	<p>This is a required field. If you are a school user, the customer is assigned by WebTrips to your school and cannot be changed.</p> <p>If you do not have a specific customer/school associated with your user ID, you can select the customer from the drop down list or search on valid customers by clicking on the Customer hyperlink. See <i>Searching for Customers</i> in <i>Appendix A: Lookup Pages</i> for details.</p> <p>WebTrips allows you to set up approval paths that can be associated with a specific customer. This allows you to specify who needs to sign-off on a trip request based on who requested the trip. For example, if the T.O.M. database had been set up to associate a specific approval path for all Central High School's trips, then when the Central school user creates a new trip request, WebTrips knows not to turn the request over to transportation until all of the appropriate users have "Approved" that request.</p> <p>The WebTrips application does not allow you to add new customers or delete existing customers.</p>
Contact	The name of who should be contacted for additional information or follow up on this field trip. 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	<p>Where is this field trip going? Select from the drop down list or click the Destination hyperlink to search existing destinations by description. See <i>Searching for Destinations</i> in <i>Appendix A: Lookup Pages</i> for details.</p> <p>If you cannot find your destination, you can create a new destination by clicking the New button from the Destination Lookup page. See <i>Creating a New Destination</i> later in this chapter for details.</p>
Fund	The fund that the field trip is charged against. If you know the fund, then enter it. If you don't know the number of the fund, click the Fund hyperlink to look up the fund by a partial search number or by searching the Fund Description. See <i>Searching for Funds</i> in <i>Appendix A: Lookup Pages</i> for details.

Trip Information in the General Section of the Request Detail Page

The trip information in the General Section of the Request Detail page (

Figure 4-5) allows you to enter dates and times for your field trip, the number of adults and students going on the field trip, the number of passengers requiring a wheelchair, if any, and other trip information, such as the estimated time, miles and purpose of the trip.



Trip Request Detail - Microsoft Internet Explorer

Entered by: madison1 7/17/2002 2:50:45 PM

5 PM

Park

Dates/Times			Passengers/Miles/Purpose		
Departure:	Oct	10	2003	# of Adults:	3
Return:	Oct	10	2003	# of Students:	60
Depart Time:	7	00	am	# Wheelchairs:	0
Arrival Time:			am	Est Time:	0
Leave Time:			am	Est Miles:	0
Return Time:	6	30	am	Purpose:	

Figure 4-5. Trip Information in the General Section of the Request Detail Page

Field	Description (required fields in gray; all others are optional)
Departure Date	<p>This is the date that the field trip will leave the school. (Or if this is a multiple day field trip this is the first date of the field trip.) This is a required field. The default is always the current system date (the date your computer displays). Select the appropriate Departure Date from the drop down lists for month, day and year.</p> <p>When you save the trip request, WebTrips checks the departure date against the T.O.M master calendar and prevents you from using a date for any day that has been closed. WebTrips displays any warnings that have been entered for that particular day on the master calendar.</p>
Return Date	<p>This is the date that the field trip will return back to the school. When you save the trip request, if the return date is blank WebTrips will make the return date the same as the departure date.</p> <p>WebTrips checks the return date against the calendar and prevents you from using a date for any day that has been closed. WebTrips displays any warnings that have been entered for that day.</p>
Departure Time	The time the field trip is supposed to depart.
Arrival Time	The time the field trip is estimated to arrive at the destination.
Leave Time	The time the field trip is supposed to leave its destination.
Return Time	The time the field trip is estimated to arrive back at the school.
# of Adults	The number of adults estimated to accompany this field trip. The number of adults is used by WebTrips to calculate the number of vehicles required to successfully perform the field trip.
# of Students	Estimated number of students expected to attend this field trip. The number of students is used by WebTrips to calculate the number of vehicles required to successfully perform the field trip.
# of Wheelchairs	The number of passengers in a wheelchair that require transportation for the field trip. This has significance to the types and number of specially



Field	Description (required fields in gray; all others are optional)
	equipped vehicles required for the field trip.
Estimated Time	Estimated number of hours that it will take ALL DRIVERS to perform the field trip. 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.
Estimated Miles	The estimated number of miles that is required to perform the field trip. You may enter both whole miles as well as portions of miles. For example, if you were to enter estimated miles of 25 and 1/2 a mile you would type 25 . 5. WebTrips 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	A further description of the field trip, useful for entering 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.

Instructions Section of the Request Detail Page

WebTrips allows you to enter several comments or instructions pertinent to the field trip (Figure 4-6). The instructions and comments follow through the request process into the field trip and are available to print out on various reports, ultimately providing a wealth of information to the bus driver assigned to this trip.

Figure 4-6. Instructions Section of the Request Detail Page

Field	Description
Customer Special Instructions	Any special instructions the driver(s) need to know when they arrive at the school site. If the customer has any special instructions in the database, WebTrips pulls these instructions into the trip request and they will be visible here when the Request Detail is saved. You may then change these assumed special instructions and customize them for a particular field trip request. This field is free form unlimited text. If you fill the available space in the box with instructions a scroll bar automatically appears, allowing you to scroll up and down to view and enter more instructions.



Field	Description
Destination Special Instructions	Any special instructions the driver(s) need to know when they arrive at the destination. If the destination has any special instructions in the database, WebTrips pulls these instructions into the trip request and they will be visible here when the Request is saved. You may then change these assumed special instructions and customize them for a particular field trip request. This field is free form unlimited text. If you fill the available space in the box with instructions a scroll bar automatically appears, allowing you to scroll up and down to view and enter more instructions.
Trip Comments	The Trip Comments field is used to allow the school to communicate any other information to the transportation department about this field trip request that cannot be placed in any of the other fields. 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. This field is free form unlimited text. If you fill the available space in the box with instructions a scroll bar automatically appears, allowing you to scroll up and down to view and enter more instructions.

Billing Section of the Request Detail Page

The Billing Section of the Request Detail page (Figure 4-7) 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.

Figure 4-7. Billing Section of the Request Detail Page

Field	Description
P.O. #	The P.O. # field is used if the school has an open P.O. for this field trip. This field is 15 characters long and is alphanumeric.



Other Section of the Request Detail Page

The Other Section of the Request Detail page (Figure 4-8) contains a variety of typically non-critical information concerning a field trip.

The screenshot shows a web browser window titled "Trip Request Detail - Microsoft Internet Explorer". The page contains several form fields: "Destination Special Instructions" (a large text area), "Trip Comments" (a large text area), "Billing" (PO #), and "Other" (Internal Trip#, Trip Category, Grade). The "Other" section is highlighted with a dashed box. At the bottom of the form are buttons for "Save", "Reset", and "**Exit**".

Figure 4-8. Other Sections of the Request Detail Page

Field	Description
Internal Field Trip#	<p>If the school has an internal field trip number, it can be entered here. This is useful for additional searching/reporting capability when the trip request is turned into a field trip.</p> <p>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.</p>
Trip Category	<p>Trip categories are user defined and used as a way of grouping your field trip and field trip requests for searching and reporting. An example of a field trip category may be athletics, fine arts, academic, etc.</p> <p>WebTrips allows a school district to setup an approval path for a specific trip category. This allows you to specify who needs to sign-off on a trip request based on what the trip is for. For example, if the T.O.M. database had been setup to associate a specific approval path for all Central High School's Athletic trips, then when the Central school user creates a new trip request and sets the Trip Category to <i>Athletic</i>, WebTrips knows not to turn the request over to transportation until all of the appropriate people in charge of Athletic trips have APPROVED that request.</p> <p>For more information see <i>Setting Up and Maintaining Approval Paths</i> in Chapter 1 – Installing T.O.M. WebTrips Software and Chapter 2: Using WebTrips: an Overview.</p>
Grade	<p>The grade of students that are taking this field trip. This field is used in T.O.M. for selecting and reporting purposes.</p>



Saving the Field Trip Request

After you have entered all of the field trip request information, click the Save button at the bottom of the Request Detail page (Figure 4-9). WebTrips validates the information (dates and times, fund number) and saves the field trip request. WebTrips will refresh the Trip Request Detail page with the saved information and/or any warnings or error messages that may have been generated based on the information you entered. If you would like to change any of the field trip information, WebTrips gives you an opportunity to do so and to resave your Trip Request.

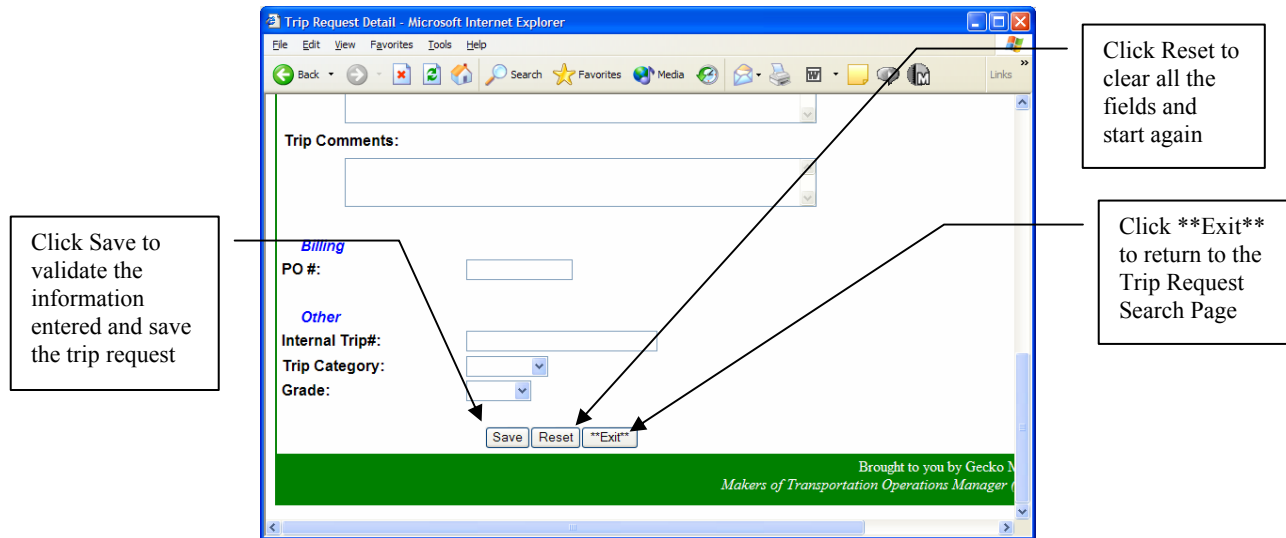


Figure 4-9. Saving the Field Trip Request

Note: If you decide to start over, click the Reset button to clear all the fields in the Request Detail page.

If you are happy with the field trip information you have entered, click the Exit button. The Trip Request Search page is displayed (Figure 4-10).

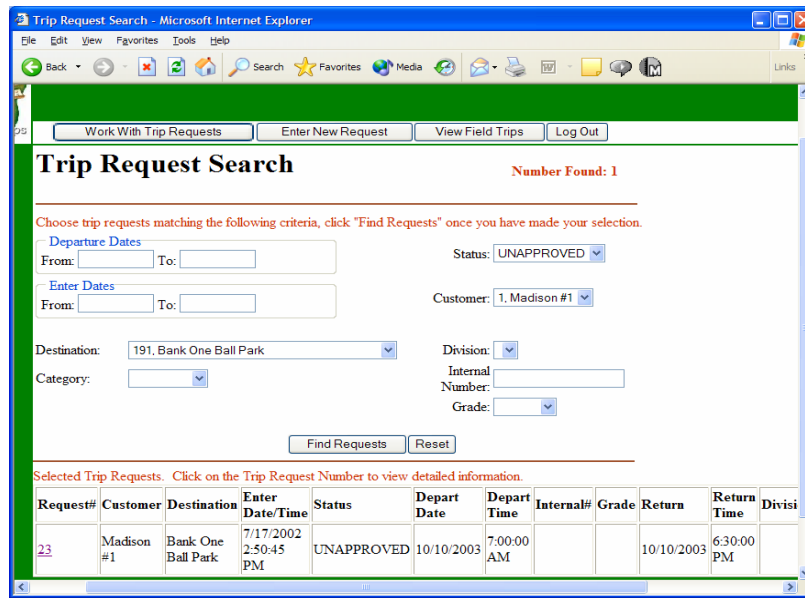


Figure 4-10. The Trip Request Search Page



Note: There is a district option setting in T.O.M. that tells WebTrips if it should automatically query the database every time it brings up the Trip Request Search page (Figure 4-10). If this setting (Auto Fill Field Trip Request Lists) is checked, then when WebTrips returns to the Trip Request Search page it will bring up a list of Trip Requests for the user's school.

Creating a New Destination

T.O.M. automatically keeps a list of all past destinations where your organization has taken field trips. WebTrips allows a school user to select any of these existing destinations when they enter a field trip request. As a school user, you may need to create a new destination while entering a field trip request. WebTrips does not immediately create this new destination in the Transportation Department's list of destinations. The destination is marked as new. When the Transportation Department reviews the trip request, they can change the destination to use one already existing. This prevents the accidental creation of multiple destination records to the same physical location.

Follow these steps to create a new destination using WebTrips:

1. If you are on the field trip Request Detail page (Figure 4-11), click the Destination hyperlink.

Click the Destination button to add a new destination

Figure 4-11. Click the Destination hyperlink if you need to add a new destination

The Destination Lookup page is displayed (Figure 4-12).

2. Click the New button.

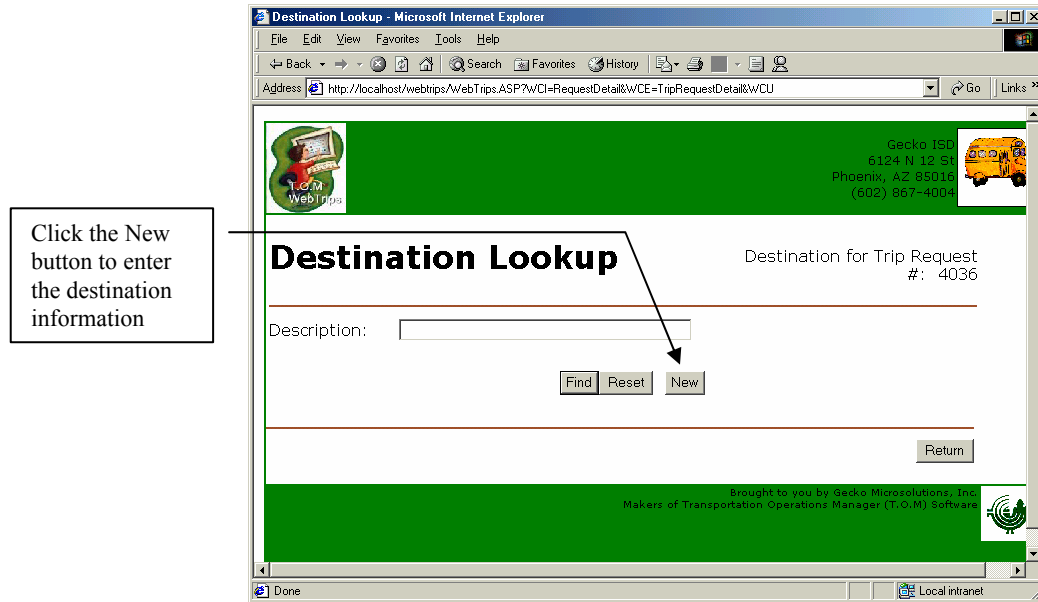


Figure 4-12. Click the New button from the Destination Lookup page

The New Destination page is displayed (Figure 4-13).

3. Enter the destination information as described below.

Figure 4-13. Enter destination information for the new destination

Field	Description
Description	<p>This is the description for this destination. The description can be up to 75 characters and should be descriptive and identifiable so others may share this destination. This is a required field.</p> <p>You should enter it as you wish it to appear in the alphabetical search in the Destination Search Page. If you enter a destination with the</p>



Field	Description
	description of 'The McCormick Ranch', you would need to begin searching with the letter 'T' or the word 'The' in the Destination Search page. If you wanted to search for the destination by typing the word 'McCormick', you would have to enter the destination description as 'McCormick Ranch, The'.
Category	Select from the drop down of destination categories, if applicable. This is a grouping that you designate for your destinations. The category is most-often used in management reports to group like trips together. For example, How many trips did we take to the movies last year? If field trips had various movie theaters as their destination and all of those theaters had a single category of "Movie Theater" a report on the frequency of trips to movies could be produced.
Average Miles	Enter the average number of miles from your school to this destination. When entering a field trip request that is going to a particular destination, T.O.M. automatically copies that destination's average miles to the field trip request's Estimated Miles. The field trip request's Estimated Miles are used by T.O.M. to calculate an estimated charge that will print on the Field Trip Estimate. In general it is a good idea to enter an Average Miles that is somewhat high to ensure that the amount that prints on the Field Trip Estimate is a <i>not to exceed</i> figure. This number can be over ridden at the specific trip level.
Address	Enter the destination's street address. You can enter up to two lines with 30 characters per line.
City	Enter the city where the destination is located, up to 15 characters.
Province / State	Enter the 2-character province or state abbreviation where the destination is located.
Postal Code / Zip	Enter the postal code or zip code of the destination, up to 10 characters.
Special Instructions	Enter any default special instructions that you commonly give your drivers when they perform field trips with this destination. The system saves these instructions and displays them in Special Instructions whenever you enter a field trip arriving at this destination. You can edit the instructions at the c field trip level. You can enter an unlimited amount of information in this field.

4. Click Return to Save the new destination and return to the Trip Request detail page.



Logging Out of WebTrips

When you are finished using WebTrips, don't forget to log out!

1. Click the Logout button near the top of any page that displays a Logout button (Figure 4-14).

Click the Log Out button to log out of WebTrips

Figure 4-14. Logging out of WebTrips

2. Click the Logout button. The WebTrips Log Out page gives you a message that it has successfully ended your session (Figure 4-15).

Figure 4-15. You have successfully logged out of WebTrips