

Chapter 2

Using WebTrips: An Overview

WebTrips lets your schools / customers enter field trip requests and check on their status using the web. It allows you to set up one or more approval layers to make sure all required parties approve the requests. The process starts with the school / customer using a browser to view existing field trips or create a new trip request by simply entering in the field trip information.

How Approval Paths Are Used in WebTrips

What is an Approval Path? An Approval Path is a list of persons that must authorize a field trip request BEFORE it can be sent to the Transportation Department.

Although not required, WebTrips will allow you to set up an approval path and assign it to a trip request based on your unique approval policy. Districts have a variety of trip request approval policies and WebTrips was designed to model even the most sophisticated. Approval policies can be placed into three basic categories. Let's look at these three...

- *There is no approval path.* User enters a trip request and it is sent directly to the Transportation Department.
- *A single approval path is followed for all trips requested by a school.* For example, the school secretary enters a trip request and an assistant superintendent approves the request before it is sent to the Transportation Department.
- *Different Approval Paths are required for different types of Field Trip Requests.* For example, a school secretary might enter an athletic field trip request that would require approval from the Athletic Director whereas a museum field trip might require approval from the Fine Arts Director. Once the appropriate approval is completed, the trip request is sent to the Transportation Department.

Although you do not *have* to have approvers, you can use WebTrips to set up various people, or *approvers*, that need to review and approve or deny each field trip request. Once all approvers in the approval "path" have reviewed and approved the field trip request, the Transportation Department receives the trip request and accepts or denies it. Only after the Transportation Department accepts the trip request does it become a field trip. Throughout this process, the school / customer can check on the status of their field trip request and review comments about the request made by the approvers or by the transportation department. That's all there is to it! It's that easy! Now, let's take a look at each of the three trip request approval policies in detail and discuss how they would be implemented in WebTrips.

No Approval Path

This scenario is the most simple. The school enters the request and it is immediately sent to the Transportation Department, as shown in the example below.



Figure 2-1. This graphic shows no approval path for a field trip request



In T.O.M. WebTrips the only setup necessary to put this policy in effect is to create school users with a username and password (see the *User* section in *Chapter 9: Security of your T.O.M. Getting Started Manual*, for more information).

Same Approval Path Used by all Trip Requests for a School / Customer

The second scenario is more complex simply because there are now approvers between the school and the transportation department. The school enters the request and it is sent to one or more approvers. All trips requested by this school go through the same approval path. The example below shows how the approval path includes two approvers. A school user enters the original trip request, then both the school's Principal and Business Manager approves the request before it is sent to the Transportation Department.

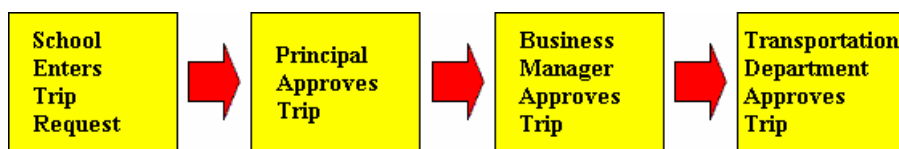


Figure 2-2. This graphic shows the same approval path used by all trip requests for a school/customer

T.O.M. WebTrips makes enforcing this type of policy easy. First create a basic approval path, next set up WebTrips approvers by associating an approval role to T.O.M. users (the Principal(s) and Business Manager in this example), then set the Customer Approval Path for all your schools. Now, when a trip request is entered, WebTrips recognizes that it must be approved by the Principal and Business Manager before being considered by the Transportation Department.

Different Approval Paths for Different Types of Field Trip Requests

The third scenario is the most complex. The school enters the request and it is sent through one of many approval paths, depending on the category of the field trip and the school / customer requesting the field trip. The example below shows how this might work. A school user enters the original trip request and the Principal is the first to review and approve all trips.

At this point, the field trip is reviewed according to its type. For example, the Athletic Director approves athletic trips (such as an out of town game) and the Fine Arts Director approves art related trips (such as the theatre group's outing), the Business Manager approves all other trips. Once the appropriate approval is completed, the trip request is sent to the Transportation Department.

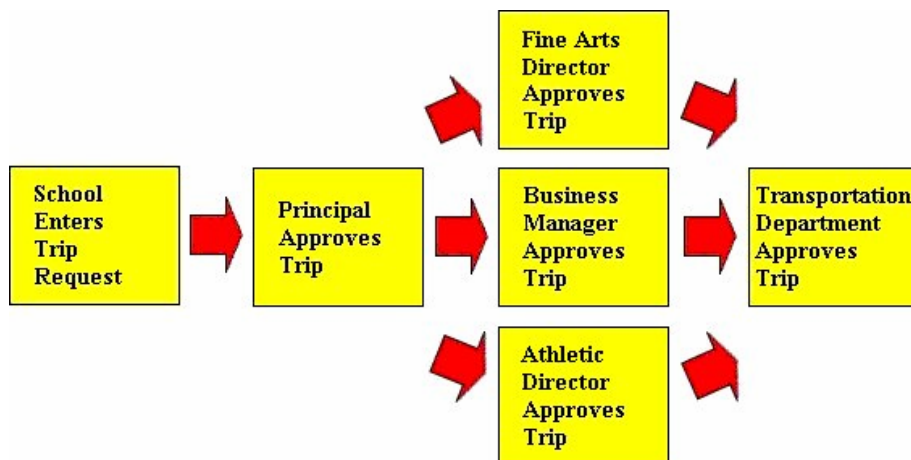


Figure 2-3. This graphic shows different approval paths for different types of field trip requests



T.O.M. WebTrips handles this type of policy through the Field Trip Category. To setup this policy you simply create an approval path for each type of trip that needs different approvals (The Basic Path, the Fine Arts Path and the Athletic Path in this example), then you setup T.O.M. users as WebTrips approvers and associate the appropriate Field Trip Category with the corresponding Approval Path. Then when a trip request is entered and categorized as an “Athletic” trip, WebTrips knows it needs to follow the “Athletic” Approval Path and that the Athletic Director must approve the request before it is turned over to Transportation.

Using T.O.M. to Set Up Approval Paths

T.O.M. was designed to handle all three of these categories of approval policies from the most simple to the most complex. T.O.M. allows you to set up user roles, approval paths, customer approval paths and trip category / customer approval paths to accomplish any of these approval policies. See [Chapter 3: Setting Up Approval Paths](#) for details.

With this feature, WebTrips not only ensures that your schools / customers can enter trip requests on the web, but that these requests can also be authorized on the web.

Using WebTrips in the Approval Process

Your responsibilities to the field trip process affect your view of WebTrips and how you interact with field trip requests. This section briefly describes the three viewpoints, depending on if you are a School User, Approver in the approval path or the Transportation Department. For complete details, refer to the following chapters:

- **School Users.** Refer to [Chapter 4: Entering a Field Trip Request](#) and [Chapter 5: Searching for Trip Requests and Field Trips](#).
- **Approvers.** Refer to [Chapter 6: Approving Trip Requests](#).
- **Transportation Department.** Refer to [Chapter 3: Setting Up Approval Paths](#) and [Chapter 7: Trip Requests at the Transportation Department](#) and *Chapter 13: Working With Field Trip Requests* in the *T.O.M Field Trip User's Guide*.

First Step: Logging In to WebTrips

Figure 2-4 shows the WebTrips login page, where everyone who uses WebTrips logs in using an assigned User Name and Password. When logging in you have two choices:

- Select Work With Trip Requests if you want to check the status of existing field trip requests or if you are an approver and need to approve or deny a request. The Field Trip Request Entry page (Figure 2-5) is displayed.
- Select Enter a New Trip Request if you wish to create a new field trip request. The Trip Request Search page (Figure 2-6) is displayed.

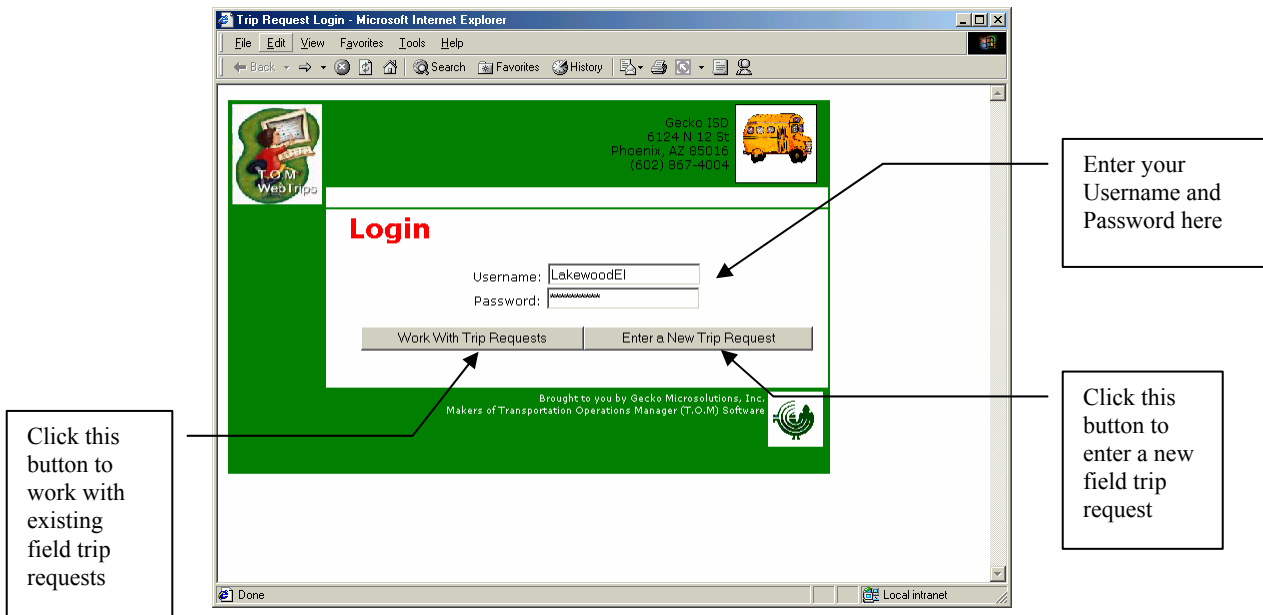


Figure 2-4. The WebTrips login page



T.O.M. Tip

The Transportation Department logs into the standard T.O.M. Field Trip Management software to view and accept or deny its pending field trip requests. See *The Transportation Department Uses T.O.M. to Approve or Deny Field Trip Requests* later in this chapter for details.

School Users Use WebTrips to Create Field Trips and Check Their Status

There are many types of field trips: classroom field trips, athletic field trips, field trips for clubs, and so on. One thing these various kinds of trips have in common is they need transportation to the location. This transportation has to be requested by the school /customer for the Transportation Department to review and either approve or deny the request. In the past, this was usually done with paper forms. T.O.M. changes this.

School Users Create New Field Trip Requests

Typically a teacher or a coach in a school, commonly referred to here as a school user, starts the field trip request process by filling out a paper form and then giving it to a school secretary. With T.O.M. WebTrips, the secretary then logs into WebTrips and enters the request. Alternately, the teacher or coach might log into WebTrips and enter the field trip request directly.



See [Chapter 4: Entering a Field Trip Request](#) for details about creating the trip request

Figure 2-5. School users create new field trip requests for approval.

As a school user, the typical steps in creating a field trip request include logging in to WebTrips and then clicking the Enter a New Trip Request button (Figure 2-4) either on the login page or in any other WebTrips page. Then you enter create the new field trip request using the Field Trip Request Detail page (Figure 2-5). Once the field trip is submitted, if no approval is required, it becomes a “Pending” field trip request. If the request does require at least one level of approval before it is turned over to Transportation, it becomes an “Unapproved” field trip request. Users can later log into WebTrips and check on the field trip request’s status (Has it been approved by the Principal? Has it been accepted, scheduled, and assigned by Transportation?). See *School Users Check the Status of Existing Field Trip Requests* in the next section.



① **T.O.M Tip**

Learn More About How School Users Enter Field Trip Requests

For complete details about creating field trip requests, see [Chapter 4: Entering a Field Trip Request](#). You’ll find step-by-step instructions about entering your trip request information as well as details about each field in the Field Trip Request Detail page.

School Users Check the Status of Existing Field Trip Requests

This feature improves communication between the Transportation Department and the Schools / Customers and results in fewer mistakes and a lower number of phone calls! It offers the school / customer many different ways to search their field trip requests. As a school user / customer, first you would log in to WebTrips and then click the Work With Trip Requests button (Figure 2-6) either on the login page or in any other WebTrips page.

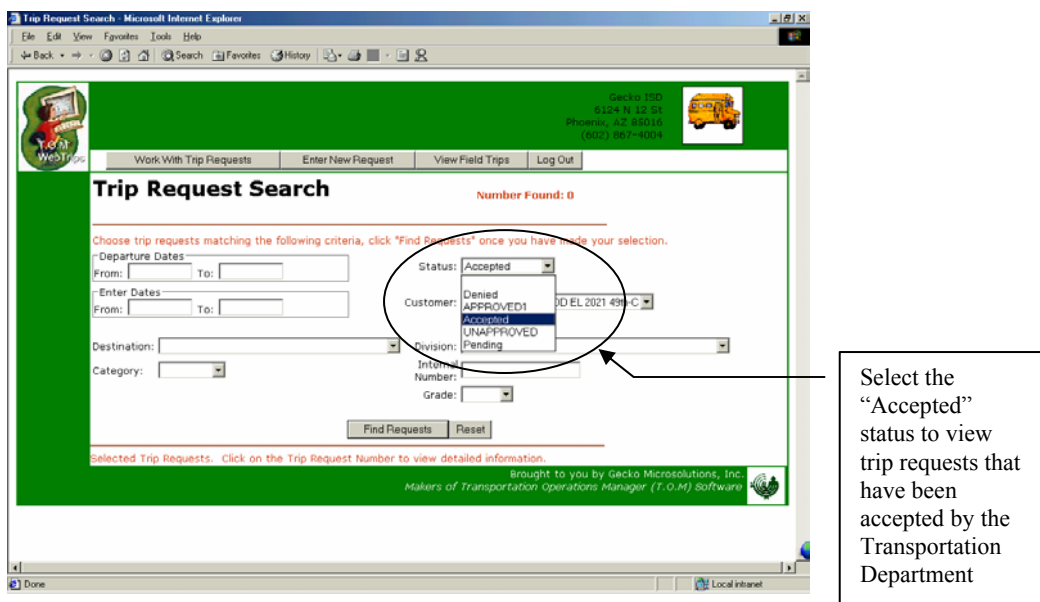


Figure 2-6. Search for field trip requests on the Trip Request Search page.

When the user has entered the desired search options and performs the search, WebTrips displays the number of trip requests found in the search (Figure 2-7). To see the results of the search simply scroll down the web page browser window.

Note: if the user is a *school user* or a *school based approver* he / she can be limited to search only trip requests submitted by their school, See [Appendix C - Specific WebTrips Options in the T.O.M. Field Trip Software](#) for more information.

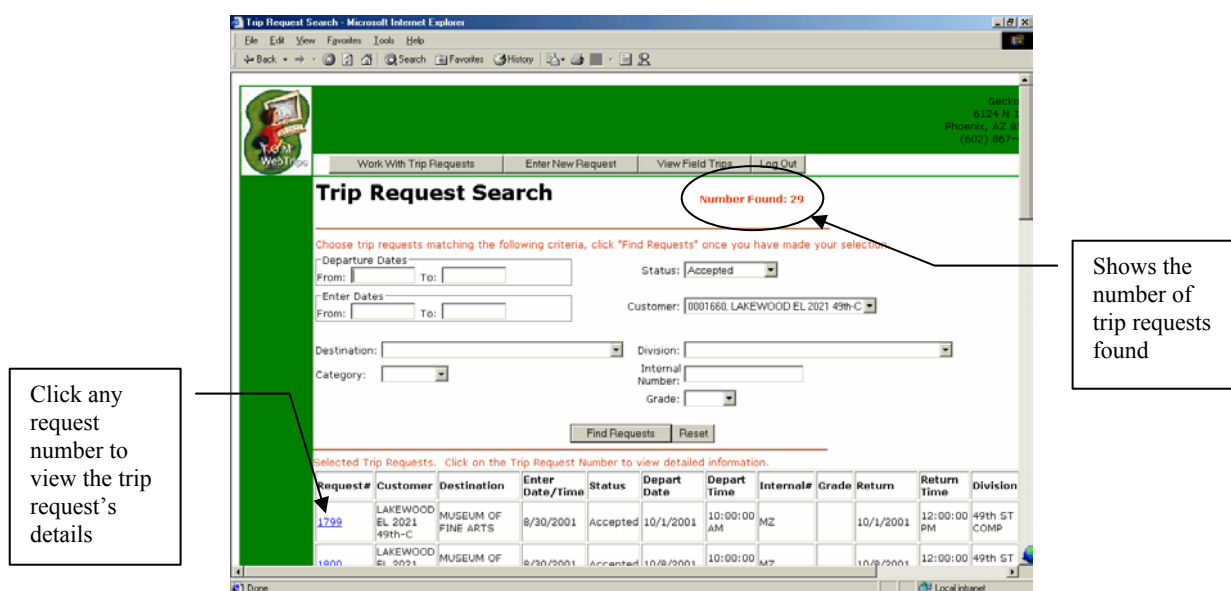


Figure 2-7. Field Trip Request Search Results



As you can see in Figure 2-7, the search results provide a great deal of information about each trip request found in the search. You can scroll up and down the search list to view the various requests that were found in the search you requested. To see details about a trip, click on the trip request number in the Request column of the list. The Request Detail page is displayed (Figure 2-8) providing the status of that field trip request.

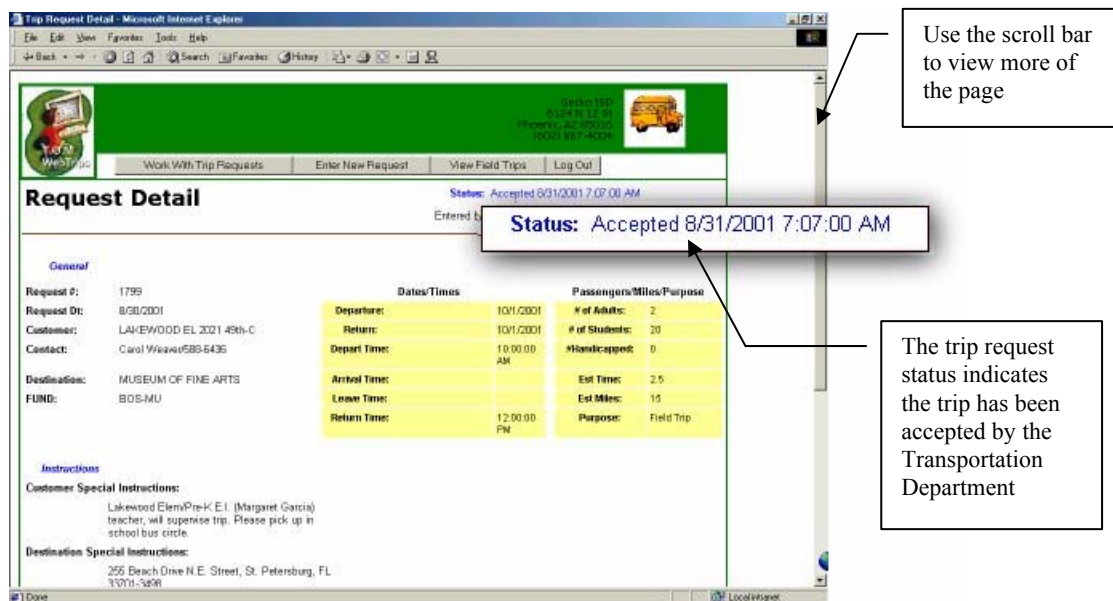


Figure 2-8. The Field Trip Detail page shows the status of the trip request and the trip's details

The Request Detail page displays detailed information for the selected field trip request. Since the request has a status of "Accepted" you are allowed to see the trip in Inquiry Mode. In fact, once the trip request has been accepted by any of the approval levels, including the Transportation Department, the school users are not allowed to change any information on the request. If any approver has not yet accepted the request, then as a school user you would be allowed to modify that particular request, if necessary.



❶ T.O.M Tip

Learn More About How School Users Work With Field Trip Requests

For complete details about selecting field trip search criteria, displaying search results, viewing trip request details, and making changes to the field trip, see [Chapter 5: Searching Field Trip Requests and Field Trips](#). You'll find step-by-step instructions about this and much more.

Approvers Use WebTrips to Approve, Deny or Enter Field Trip Requests

An approver, in general, decides if a field trip request should be granted. WebTrips makes it easy for your organization to have approvers log in, review trip requests awaiting their approval and approve or deny the requests. These powerful features allow your organization to better track and manage your field trip requests, improve communications and reduce mistakes. The approver may also enter new field trip requests. Although WebTrips allows for many approvers, they tend to fall into two basic types:

- A school level approver is a person positioned at the school like a principal who tends to approve trip requests for just one school / customer.



- A district level approver is a person positioned outside of the school such as an assistant superintendent or business manager who tends to approve trip requests for more than one school.

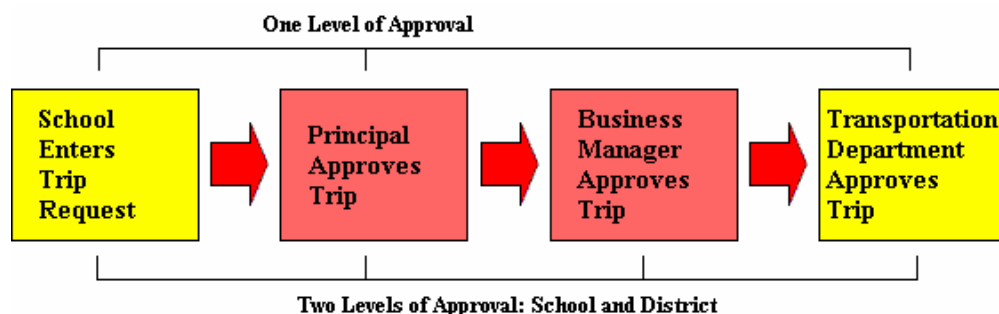


Figure 2-9. This graphic shows a typical school level AND district level approval path

Multiple Approvers Approve or Deny Field Trip Requests

Let's look at an example of multiple approvers using a Principal and Assistant Superintendent. When the school enters the trip request, WebTrips sends it to the school Principal. If the Principal approves the trip, WebTrips then sends it to the Assistant Superintendent. Finally, if the Assistant Superintendent approves the trip, it is sent to the Transportation Department.

First Approval at the School Level by the Principal. When the Principal logs in and selects Work with Trip Requests, the Trip Request Search page is displayed (Figure 2-10). Notice that WebTrips has already searched all the trip requests waiting for the Principal's approval.

Number Found: 1

Customer: 0001660, LAKEWOOD EL 2021 49th-C

Request#	Customer	Destination	Enter Date/Time	Status	Di
4006	LAKEWOOD EL 2021 49th-C	LAKE CHATAGUA PARK	9/14/2002 9:47:50 AM	UNAPPROVED	45

Figure 2-10. The Trip Request Search page displays trip requests awaiting the approver's review



In Figure 2-10, WebTrips has found one trip request that needed attention. To review the outstanding trip request, the Principal clicks on the Request number displaying the Detailed Field Trip page for the selected request (Figure 2-11). The page shows that the trip status is, at this point, “Unapproved.”

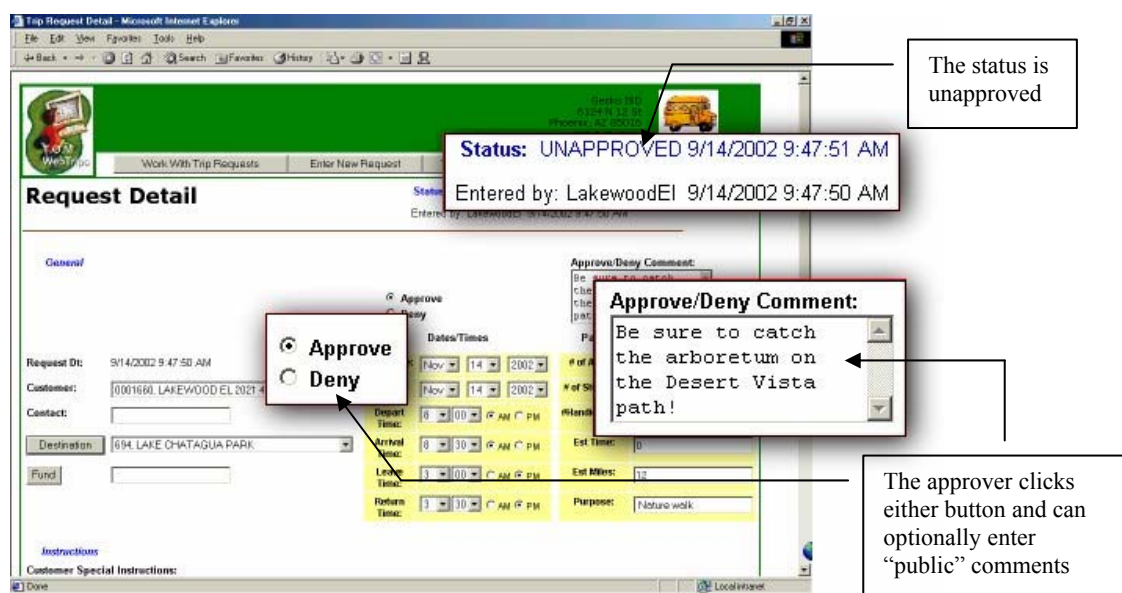


Figure 2-11. If you are an approver, you see the approve and deny buttons and the comments box

As the approver, the Principal sees two additional fields the school user does not see. The Principal approves or denies the request and can optionally enter comments in the Approve/Deny Comments box. These comments will be added to the field trip and can be seen by anyone viewing the field trip.

Second Approval at the District Level by the Assistant Superintendent. Once the Principal has approved the field trip, WebTrips sends the request to the Assistant Superintendent, who is at the district level. When the superintendent selects to work with field trips, the requests that need his or her attention are automatically displayed in the Trip Request Search page (Figure 2-12).



One field trip request has been found for review

Number Found: 1

The field is blank since requests for the entire district are searched

Customer: [Blank]

An approver can review a trip request by clicking on the trip request number

Request#	Customer	Destination	Enter Date/Time	Status	Dir
4006	LAKEWOOD EL 2021 49th-C	LAKE CHATAGUA PARK	9/14/2002 9:47:50 AM	APPROVED1	49th-C

Figure 2-12. Field trips listed on the Field Trip Request Search page for the district approver

Notice that for the Assistant Superintendent, WebTrips did NOT automatically fill in a search customer (school). This is because the Assistant Superintendent has been set up as an approver that approves trip requests for *more than one* school in the district.

The search found one trip request that was awaiting the Assistant Superintendent's attention. He/she selects this request by clicking on the Request Number and displaying the Request Detail page for the selected request. The Assistant Superintendent sees the same page that the Principal saw, including the same Approve/Deny options. The difference is in the status, which has changed to "Approved1" meaning the Principal has approved it. If the Assistant Superintendent elects to approve the field trip request, the request status is changed to "Pending", effectively turning over the request to the Transportation Department.

The Transportation Department Uses T.O.M. to Approve or Deny Field Trip Requests

When the Transportation Department receives a trip request from WebTrips, they can be sure that all required parties have authorized it. Therefore, the Transportation Department can concentrate on deciding if it has enough warning and enough resources to fulfill the trip request.

The Transportation Department would use the standard T.O.M. Field Trip Management software to view and accept or deny its pending field trip requests. When the Transportation Department accepts a trip request, a new field trip is created in T.O.M.'s field trip dispatching database using the information from the request. The trip request is then "frozen" so that no party can further change that request and must contact the Transportation Department to make changes to the trip.

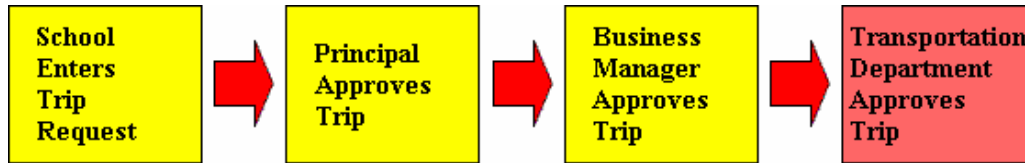


Figure 2-13. The Transportation Department uses T.O.M. to approve or deny field trip requests

Accepting an online field trip request takes much less time than having the Transportation Department retype the field trip into the dispatching database. The Transportation Department may approve or deny a field trip request and may also add comments to the Comments box.

Field Trip Requests are Viewed by the Transportation Department

When a user from the Transportation Department selects the “Field Trip Requests” option in the T.O.M. Main Menu, the Field Trip Request Search screen is displayed (Figure 2-14). Notice the search screen has automatically been set to show only trip requests that are “Pending” the Transportation Department’s approval.

Field Trip Request Search

Field Trip Requests

Number of trips selected: 24

Departure Date Range: From: To: Status: Pending

Enter Date Range: From: To: New Dest Only:

Customer: Selected Division:

Destination: Selected Internal Number:

Selected Grade:

Request#	Customer	Destination	Enter Date/Time	Status
4006	LAKEWOOD EL. 2021 49th-C	LAKE CHATAGUA PARK	9/14/2002 9:47:50 AM	Pending
4001	ACADEMIE DA VINCI - CLW	A.M.C. THEATERS WOODLANDS	8/28/2002 12:10:41 PM	Pending
4000			8/12/2002 10:57:06 AM	Pending
3999			8/12/2002 10:53:02 AM	Pending
3998			8/12/2002 10:50:30 AM	Pending
3997			8/12/2002 10:46:49 AM	Pending
3996			8/12/2002 10:39:44 AM	Pending
3995			8/12/2002 10:24:59 AM	Pending
3994	28th STREET S. R-CLUB	ABERCROMBE PARK	7/30/2002 11:12:52 AM	Pending
3993	28th STREET S. R-CLUB	ABERCROMBE PARK	7/30/2002 11:11:51 AM	Pending
3989			7/15/2002 12:47:14 PM	Pending

Find All New Edit Delete Calendar Exit

Finds all pending trip requests ready for Trans. Dept. review

Figure 2-14. The T.O.M. Field Trip Requests Screen

The Transportation Department user can view the request’s details by selecting the request and clicking the Edit button (Figure 2-14), displaying the Field Trip Request screen (Figure 2-15). From here the user would review the request’s details, change the request (if necessary), accept or denying the request and optionally enter comments regarding the request.



T.O.M. - Trip Requests

Field Trip Request

Status: Pending 8/28/2002 12:10:41 PM
Entered By: t.o.m.
8/28/2002 12:10:41 PM

General Instructions Assignment Billing Other

Request #: 4001
Request Date: 8/28/2002
Customer: 000004 ACADEMIE DA VINCI - CL
Contact:
Destination: 747 AMC THEATERS WOODL
TAMPA ROAD
Split Fund:
Fund:
Calendar

Departure: 8/28/2002
Return: 8/28/2002
Departure Time: 8:00 AM
Arrival Time:
Leave Time: 4:20 PM
Return Time:
Calendar

OK Addit. Trip Dates Accept Deny Comment from Trans. Dept.

The AMC is not available on this day. Please reschedule for a Wednesday instead.

The Trans. Dept. can accept or deny a trip request

Comments can be viewed in T.O.M. and WebTrips

Figure 2-15. The Transportation user approves or denies the request and can optionally enter comments



T.O.M Tip

For additional information about the Transportation Department's function involving field trip requests, refer to [Chapter 3: Setting Up Approval Paths](#) and [Chapter 7: Trip Requests at the Transportation Department](#) and Chapter 13: Working With Field Trip Requests in the T.O.M Field Trip User's Guide.