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Last Updated: October 7, 2002

## Introduction

The purpose for this module is to automate request for bussing and approval processes. Rather than:

- schools writing and sending information,
- maintenance reviewing/rewriting this information
- maintenance assigning bus(s) and notifying the school
- creating some database(s) on field trips per location
- creating journal entries for accounting
- .. lacking in reporting

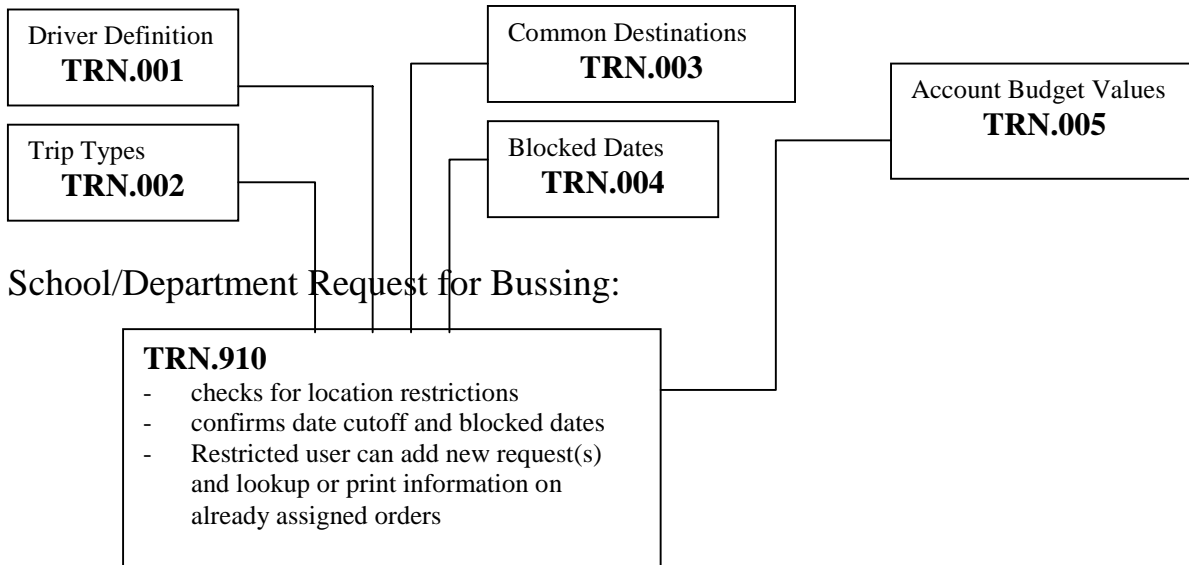
CIMS bus requests will allow the user to request online, maintenance to approve, assign, and report online with no duplication of effort and benefit for all in terms of tracking and reporting.

All requests for bussing other than standard morning and afternoon routes can be requested within this module.

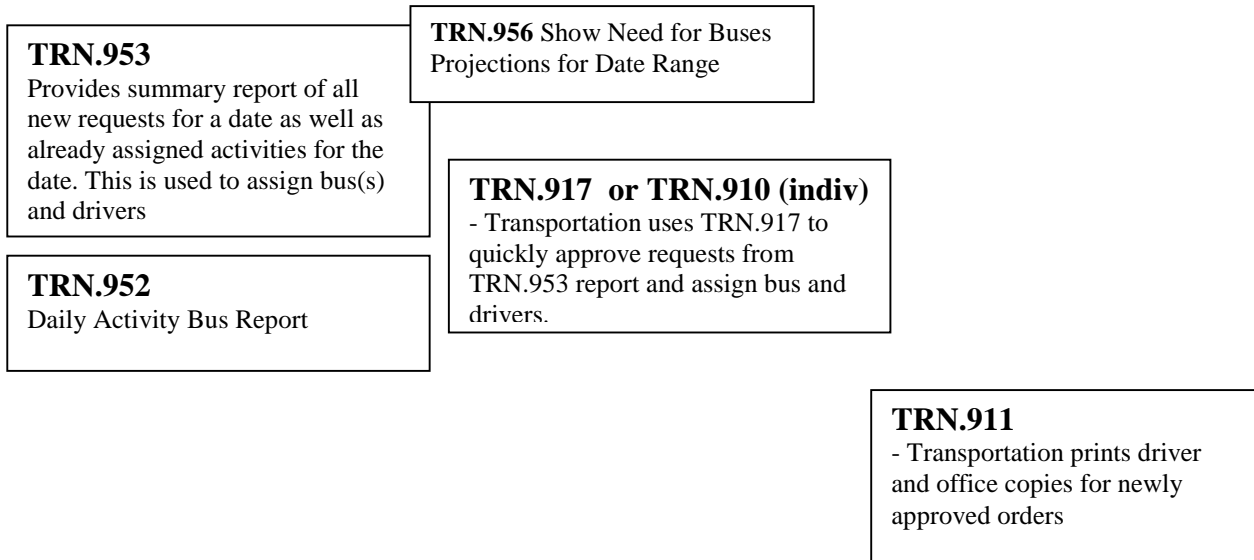
No additional security has to be setup. If a user is restricted to a location for CIMS student, the system assumes identical restriction for bussing requests.

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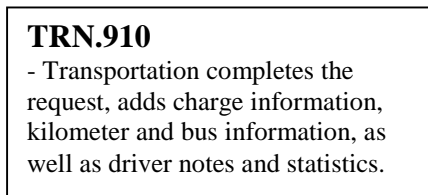
### How Information Flows in Field Trip



### Daily Transportation Department Activities:



### Driver Returns Paperwork with Details:



Transportation can post daily bus activity using TRN.952 (wall posting)

Transportation can report on trips in detail or summary for any range or type using TRN.954

Schools can report on their charges and field trips with TRN.954 and TRN.955

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## How Field Trip works with other Applications

### Integration to CIMS Finance

When transportation completes an order, charges can automatically be posted to the G/L with detailed information. Default charge accounts can be initiated on the request based on trip type (eg: field trip, sports trip, school program) and requester can over-ride if necessary.

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## System Setup and Definitions

### Define Drivers – TRN.001

Assigning trips to driver numbers makes it possible to sort and sub-total based by driver. Driver Numbers are numeric but users can use 'F4' list when inputting to get a listing of drivers in alpha order.

Some districts setup driver numbers to match seniority (eg: Highest seniority = driver 10, next = 20, next 30) .. the space between drivers allows others to slide between in seniority ranking



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### **Define Field Trip Types – TRN.002**

Defining field trip types will assist for reporting purposes and also to setup default account charges by type. Each bus request must contain a valid trip type .. it assists the requester to dictate what type of request is being initiated.



The account code can be pre-determined OR request location code (eg: School location ID) can be used in substitution by using question marks. When this code is used by schools, they must replace the ?? with their valid location code.

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### **Define Common Destination Codes – TRN.003**

Defining common destination codes assists in entry of requests with proper names and addresses/locations. It also can default trip type and provide an estimate of charges per bus to go there. The estimated cost DOES NOT auto-fill into the charges screen. It is meant to provide some budget estimate values for schools.



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## Date Block Maintenance – TRN.004

Date block maintenance allows transportation to make specific dates unavailable to restricted users when adding requests. It provides a space for reasons to be entered of why the date was blocked, Christmas break, buses all booked, etc. Unrestricted users retain the ability to maintain requests for blocked dates. Schools can be given TRN.004L to be able to see what dates are blocked and why.



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## School Budget Maintenance – TRN.005

Budget maintenance allows fund allocation for bussing requests to be assigned to specific accounts for each school, i.e. schools may be allotted \$6,000 to a generic account for field trips. Since the account is the same for all schools, finance would show the total budget of the account, whereas TRN.005 allows the funds to be broken up for each school. The budget remaining for each schools' accounts are printed on TRN.955 - Bussing Requests School Charges Report and displayed on this screen as well.

The purpose of this is 'fake' accounting. No G/L transactions occur, but the schools & transportation can keep track of how much each school has contributed/costed by field trip type.



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## Field Trip Maintenance and Processing

Schools/Departments initiate requests using TRN.910. The system will prevent users from back-dating requests, using blocked dates and using a date that is a minimum of 2 days from today ( Seven Oaks minimum is 3 days, River East minimum is 4 days). Schools may generate a copy of the request if necessary.

Approval and assignment of the request is done ‘paperless’. Schools have the opportunity to review and print request information at every stage of the request, ie:

- a) Request
- b) Approved and assigned
- c) Completed

There is always an opportunity to print summary reports of activity per location and/or charge type.

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### ***Bussing Request Maintenance (Schools) – TRN.910***

Schools are restricted to their own information.  
System automatically numbers requests sequentially.

Order will NOT be processed until requester has completed Ready to Go as ‘Y’. If transportation is unhappy with the request, they may contact you OR remark the request Ready to go ‘N’. This will make it appear in the school queue again to review and re-submit.

The screenshot shows a terminal window titled 'Session A - [24 x 80]'. The menu bar includes 'File', 'Edit', 'Insert', 'Appearance', 'Communication', 'Agent', 'Window', and 'Help'. The toolbar contains icons for Print, Copy, Paste, Send, Recv, Display, Color, Mail, Record, Stop, Play, Quit, Check, Support, and Index. The main display area shows the following information:

2/07/02 FY 00 DEMONSTRATION SCHOOL DISTRICT 13:42:54 QPADEV0002  
BUSINESS Bussing Request Maintenance Ref: TRN\_910\_11  
Trip#: 200100024 School: 030 DEMO SCHOOL Booked: 11/22/00 User: DONNA  
Ready to go?  Approved: \_\_\_\_\_ User: DONNA  
Completed: \_\_\_\_\_ User: \_\_\_\_\_  
Pickup: 030 BACK GYM ENTRANCE Date: 9/01/00 Time: 9:00 24 hr  
Destination: MUSEUM OF MAN AND NATURE Depart Destination: 14:00 clock  
MAIN STREET  
# Students: 25 # Supervisors: 2 Grades: 9-12  
Main Contact: MRS. SMITH  
Supervisors: MRS. PEACH  
Instructions: \_\_\_\_\_  
Type of Trip: EI FIELD TRIP Wheelchair Bus Req'd?   
Transport Equipment?  Bus to Stay With Group?   
Account: 9.1100.100.7500.00 Equipment Notes: TRUCKLY EQUIPMENT  
Notes: \_\_\_\_\_ View Charges?   
Internal Note?   
Mode: Change F3-Exit F4-Index F5-Reset F12-Cancel

The status bar at the bottom shows '09/010'.

Approved and Completed Information is ‘look only’ for schools.

Pickup school # and Description: Mandatory fields. User must indicate what location the bus is to be at as well as further details regarding doors or entrance.

**Date and Time:** Mandatory fields. Indicate what date the trip is for and what time the bus is to be at the location.

**Destination and Destination Depart time:** Mandatory fields. Indicate what the trip destination is (use F4 to view a list of common destinations) as well as what time the bus is to be back at that location for the return trip. If the trip is one-way make sure to put 9999 in destination depart time.

**# of Students, # of Supervisors:** Mandatory Fields. Indicate how many students and supervisors will be going on the trip.

**Grades, Contact, Supervisor Information:** Optional. Complete who is in charge and names of supervisors.

**Instructions:** This is your opportunity to communicate with transportation and the bus driver(s). Input pertinent details for the trip and or students. Use Internal Note for instructions to transportation regarding your request.

**Wheelchair Bus Required:** Mandatory. By default system assumes blank or 'N'. Make sure to change this to 'Y' when required.

**Field Trip Type:** Mandatory. Indicate the reason for the request. Use 'F4' on this field for a list of valid types.

**Bus to Stay with Group:** Mandatory. Indicate whether bus must remain onsite until departure.

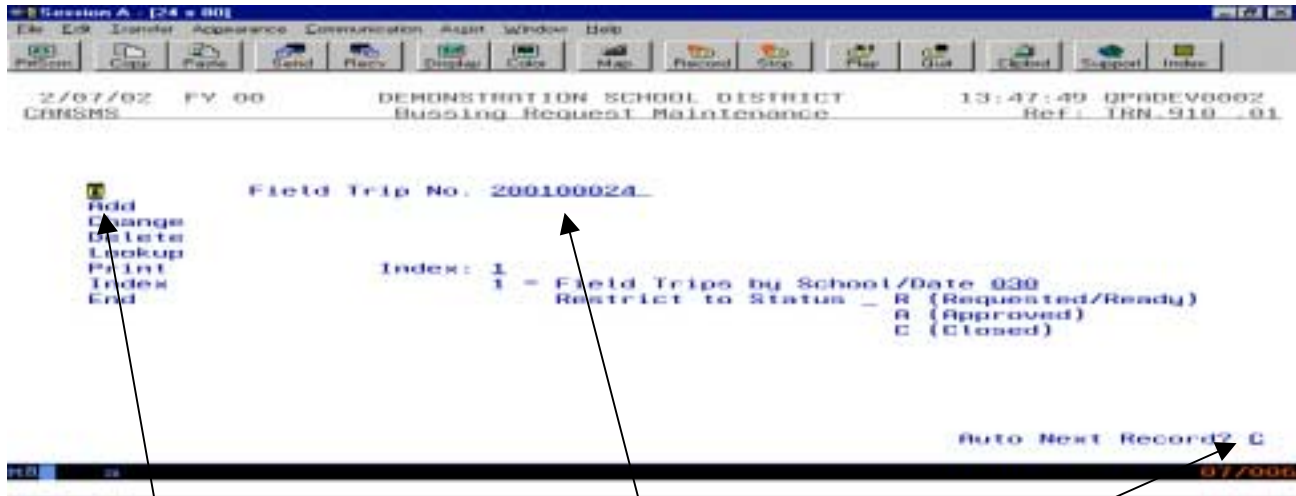
**Equipment Info:** Indicate whether equipment will be transported and provide details regarding what must be transported in the notes fields.

Press ENTER to complete the request. Providing Ready to Go says 'Y' your request will show up immediately at transportation.

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**Special Instructions: Creating Mass requests (eg: weekly bus trip to shops for all grade 9s's)**

1. Create your first request using TRN.910 standard operation
2. To create new request(s) based on an existing item, use 'A'dd with 'C'opy



'A'dd a new request

Indicate request# to copy from (already exists in the system)

Indicate 'C' to copy existing request to new one

A new request will appear completely filled in and the system will assign a new number for the request. Input a date and ENTER to save the new request. Continue with the operation for as many dates as you require.

## Approve/Assign Bussing Requests

### Morning Activities:

- Produce bussing requirement/projection report by date range to know in summary what expectations for bussing are required (TRN.956)
- Produce report TRN.953. This program produces 2 summary reports of bussing requests and booked drivers for a specific trip date or date range to assist in scheduling buses and drivers. Only bussing requests that have not been marked completed are included on the report. Its purpose is to highlight new requests for bussing as well as provide details of drivers already assigned.
- Use the TRN.953 report and paperwork to assign drivers and buses to new requests (on paper)
- Use TRN.917 to quickly 'A'pprove each request and indicate drivers, buses, and additional information as necessary on multiple requests. Use TRN.910 for individual requests.
- Use TRN.911 to produce driver copies.

### Sample TRN.953

Session A - [27 x 132]

File: Control - - - - - 1 OTD953R  
 Fund: - - - - -

Dependation School District  
 ONLY REPORT OF BUSSEING REQUESTS  
 TRIP DATE SEP. 01, 2000 - SEP. 01, 2000

Page/Line Columns 1/4 100  
 Page 1

TRIP DATE	TRIP TIME	TRIP SEC	DESTINATION	ROUTE	TYPE	METH	SEV	MC	BUS	EQUIPM	NOTES	REQUEST#	STATUS
SEP. 01, 2000	9:00	1	WAY OFF DONNA'S HOUSE	20	FT		Y	Y			SUPPLING CODE	200100000	REQUEST
9:00	14:00	030	MUSEUM OF MAN AND NATURE	20	FT		Y				ROCKY EQUIPMENT	200100002	REQUEST
9:00	14:00	030	MUSEUM OF MAN & NATURE	40	FT		N	N			ROAD EQUIPMENT (LARGE VEHICLE)	200100006	REQUEST
13:00	14:00	030	PYM RH POOL	22	FT							200100010	REQUEST
13:00	14:15	022	YH-YACH	30	FT		N					200100011	REQUEST

Session A - [27 x 132]

File: Control - - - - - 1 OTD953R  
 Fund: - - - - -

Dependation School District  
 ONLY REPORT OF BUSSEING REQUESTS DRIVERS  
 TRIP DATE SEP. 01, 2000 - SEP. 01, 2000

Page/Line Columns 1/4 100  
 Page 1

DRIVER	PICKUP LOCATION	REQUEST#	VEHICLE	NOTES	TRIP DATE	TRIP TIME	TRIP SEC	DESTINATION	ROUTE	TYPE	METH	SEV	MC	BUS	EQUIPM	NOTES	REQUEST#	STATUS
SEP. 01, 2000																		
DONNA (DANMOSHI)	200100000	20	FT		SEP. 01, 2000	9:00	1	WAY OFF DONNA'S HOUSE	20	FT		Y	Y				200100000	REQUEST
KIM (DAMI)	200100002	20	FT		SEP. 01, 2000	9:00	14:00	MUSEUM OF MAN AND NATURE	20	FT		Y					200100002	REQUEST
DONNA (DANMOSHI)	200100006	40	FT		SEP. 01, 2000	9:00	14:00	MUSEUM OF MAN & NATURE	40	FT		N	N				200100006	REQUEST
KIM (DAMI)	200100010	22	FT		SEP. 01, 2000	13:00	14:00	PYM RH POOL	22	FT							200100010	REQUEST
KIM (DAMI)	200100011	30	FT		SEP. 01, 2000	13:00	14:15	YH-YACH	30	FT		N					200100011	REQUEST

The report is sorted by date and length of trip request. This assists in assigning from the top based on seniority.



## Completing Request Information/Charges – TRN.910

Once a trip has been completed, the driver must complete his paperwork and return to transportation. Based on this information, transportation closes the order and completes information namely:

- indicate trip charges
- indicates completed trip info (odometer, number of students, notes)
- close order with close date

### Trip Completion Details

2/07/02 FY 00 DEMONSTRATION SCHOOL DISTRICT 14:01:59 QPADEV0002  
 CANSMS Missing Request Maintenance Ref: TRN\_910L\_11  
 Trip#: 200100020 Sched Pickup: 9:00 Dest Pickup: 16:00 # Students: 25  
 Schl#: 030 Date: 11/01/00 Dest: MUSEUM OF MAN & NATURE  
 Distance: 28.0 Total Time: 12:44

LEB	Veh	Driver	SchPk	DesPk	SchRt	Distance	Time
BEGIN							
	-> AM1	DONNA GRABOWSKI	9:00	14:00	14:30	28.0	6:22
002.0000	AM4	KIM PARR	9:00	14:00	14:30		6:22
002.0000	TRUCK1	KIM PARR	9:00	16:00			

1.00 Veh#: AM1 Driver: 1 DONNA GRABOWSKI  
 Base Depart Time 8:00 Orig Pickup Time 9:00  
 Base Return Time 15:00 Dest Depart Time 14:00 Orig Return Time 14:30 Base Return Time 15:00  
 Trip Time (HMM) 6:22 Total# Passengers 25  
 Odometer In 18242.9 Notes  
 Odometer Out 18270.9  
 Distance 28.0

F2-Exit F4-Index F5-Reset F12-Cancel Cancel? N

For each vehicle involved in the trip indicate trip time, odometer, and passenger information. The trip time and mileage for each vehicle will be summarized and defaulted into the first line of the charge screen.

### Trip Charges

2/07/02 FY 00 DEMONSTRATION SCHOOL DISTRICT 14:00:37 QPADEV0002  
 CANSMS Missing Request Maintenance Ref: TRN\_910\_12  
 Trip#: 200100020 Sched Pickup: 9:00 Dest Pickup: 16:00 # Students: 25

CHARGES

Level1: ( kas 100.00 X rate 3.00 ) + ( hrs 6.50 X rate 1.00 ) = 306.50  
 Account: 9.1100.000.3700.01

Level2: ( kas 100.00 X rate 2.00 ) + ( hrs \_\_\_\_\_ X rate \_\_\_\_\_ ) = 200.00  
 Account: 9.1100.100.7110.01

Level3: ( kas \_\_\_\_\_ X rate \_\_\_\_\_ ) + ( hrs \_\_\_\_\_ X rate \_\_\_\_\_ ) = .00  
 Account: \_\_\_\_\_

Extra : ( kas \_\_\_\_\_ X rate \_\_\_\_\_ ) + ( hrs \_\_\_\_\_ X rate \_\_\_\_\_ ) = .00  
 Account: \_\_\_\_\_

**TOTAL CHARGES: 506.50**  
 Recalculate/View? Y

Mode: Change F2-Exit F4-Index F5-Reset F12-Cancel

If there are multiple charge rates, split the hours and mileage into the multiple levels.

# Reports

## Daily Wall Posting – Bus Activity (TRN.952)

Request what trip date to print:

Display Specified File

Page/Line Columns 1/4 130

Page 1

VEHICLE	DRIVER	TRIP TIME	DEPT	SCH	DESTINATION	TRIP TYPE	BLD WITH	STBY	SEC	REQ	EQUIPMT	TRIPREQST	REQUEST#
12	DONNA GONDOLESKI	13:00	003	003	DONNA'S HOUSE	PT	N					Y	000100035
118	RIP PAPE	13:00	003	003	WY-YUCH	PT	N					N	000100018
62	DONNA GONDOLESKI	13:00	003	003	MUSEUM OF PAW & NATURE	PT	N					Y	000100036
630	RIP PAPE	13:00	003	003	MUSEUM OF PAW & NATURE	PT	N					Y	000100034
67	RIP PAPE	13:00	003	003	MUSEUM OF PAW & NATURE	PT	N					Y	000100036

Report is sorted in Vehicle# order and displays summary information about each trip for the day.

## Bussing Requests Summary/Detail Report (TRN.954)

This report can produce a summary or detail report for a trip date range by driver, bus, school or destination and can be limited to a single driver, bus or location.

### Detail Report

Display Specified File

Page/Line Columns 1/4 130

Page 1

DRIVER	REQUEST#	SCH	TRIP DATE	DESTINATION	WSTU HOURS	TOTL	REQ	TOTL	COST	REMARK
GONDOLESKI, DONNA	000100035	003	5/01/00	DONNA'S HOUSE	25	31.00	30.0			00 FIELD TRIP
GONDOLESKI, DONNA	000100036	003	5/01/00	MUSEUM OF PAW & NATURE	25	31.00	30.0			00 FIELD TRIP
PAPE, RIP	000100018	003	5/01/00	WY-YUCH	32	1.00	30.0			00 FIELD TRIP
PAPE, RIP	000100034	003	5/01/00	MUSEUM OF PAW AND NATURE						100.35 FIELD TRIP
PAPE, RIP	000100036	003	5/01/00	MUSEUM OF PAW & NATURE						00 FIELD TRIP
				<b>GRAND TOTAL:</b>	<b>8100</b>	<b>96.0</b>	<b>140.35</b>			

# Summary Report

```

File ..... : 0TRN9545
Control .....
Find .....
Display Spooled File
Page/Line 1/4
Columns 1 - 80

Ref: TRN.9545 DEMONSTRATION SCHOOL DISTRICT Page 1
Date: 2/07/02 BUSING REQUEST DRIVER SUMMARY REPORT BY DRIVER
Time: 14:06:15 DRIVER BUS SCHOOL 9/01/00 9/01/00

-----
DRIVER NO. OF TRIPS TOTAL HOURS TOTAL HRS TOTAL COST
-----
GARDINESKI, DONNA 2 6:30 35.0 .00
PAPER, KIM 3 1:30 20.3 .00
GRAND TOTAL: 5 8:00 55.3 140.75
-----

F3=Exit F12=Cancel F13=Left F12=Right F14=Home Keys Bottom
01/00

```

## School Charges Listing (TRN.955)

School can list what charges have been applied from bus requests for any date range. Report previews all charges in summary of request and can optionally provide school budget by account information for all year-to-date requests.

```

File ..... : 0TRN955
Control .....
Find .....
Display Spooled File
Page/Line 1/4
Columns 1 - 130

Ref: TRN.955 DEMONSTRATION SCHOOL DISTRICT Page 1
Date: 2/07/02 BUSING REQUEST DRIVER SUMMARY REPORT
Time: 14:04:55 DRIVER BUS SCHOOL 9/01/00 9/01/00

-----
TRIP DATE DESTINATION/DRIVER CONTACT COST HRS HRS ACCOUNT CHARGES ACCOUNT CHARGE
-----
000 00010000 9/01/00 REGION OF HSP & NATURE 40 20 3.0

***** SUMMARY ACCOUNT CHARGES *****
ACCOUNT YEAR-TO-DATE BUDGET SUMMARY BUDGET BUDGET SPENT BUDGET BUDGET
-----
9.1100.100.7110.01 8,000.00 302.23 5,596.89
9.1100.000.7100.01 200.00 200.00 40.00
9.0000.000.0000.00 40.00 40.00 40.00

F3=Exit F12=Cancel F13=Left F12=Right F14=Home Keys Bottom
01/00

```

## Bussing Requirement Projections by Date Range TRN.956

Use this report to forecast bussing needs for any given date range. The system will count one bus automatically for each trip, then use the capacity selection figure to work out additional expected number of buses required.

This report should be used for budgeting. The information is based on standard capacity.

File Edit Insert Appearance Communication Assist Window Help

Print Copy Paste Send Recv Display Color Map Record Stop Map Quit Global Support Index

File: OTR956 Display Spooled File Page/Line 1/4 1 - 88

Control: + + + + + Find: + + + + +

Ref: TRN.956 (ADMINISTRATOR SCHOOL DISTRICT) Page: 1

Date: 2/07/02 BUS REQUIREMENT PROJECTIONS BY DATE

Time: 14:12:07 DATE RANGE: 10/01/01 - 2/07/02 CAPACITY: 70

TRIP DATE	REQUESTS	STUDENTS	BUSES	REQUIRING	REQ EQUIP TRANSPORT
OCT. 06. 2001	1	70	1	0	0
DEC. 07. 2001	1	10	1	0	0
JAN. 08. 2002	1	2	1	0	0
FEB. 12. 2002	1	95	5	0	1
GRAND TOTAL:	5	77	5	0	1

F3=Exit F12=Ceasel F13=Left F20=Right F24=New Page

Buttons