

TABLE OF CONTENTS

INTRODUCTION 2

 HOW INFORMATION FLOWS IN FIELD TRIP 3

 INTEGRATION TO CIMS FINANCE..... 3

FIELD TRIP MAINTENANCE AND PROCESSING..... 4

 BUSSING REQUEST MAINTENANCE (SCHOOLS) – TRN.910 4

 SPECIAL INSTRUCTIONS: CREATING MASS REQUESTS (EG: WEEKLY BUS TRIP TO SHOPS FOR ALL GRADE 9S’S) 6

 SCHOOL CHARGES LISTING (TRN.955) 7

Last Updated: February 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(es) 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 (schools) 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.

How Information Flows in Field Trip

School/Department Request for Bussing:

TRN.910

- Checks for location restrictions
- Confirms date cutoff and blocked dates
- Restricted users can add new request(s) and lookup or print information on already assigned orders

Daily Transportation Department Activities:

TRN.953

Provides summary report of all new requests for a date as well as already assigned activities for the date. This is used to assign bus(s) and drivers

**TRN.917 or TRN.910
(indiv)**

- Transportation uses TRN.917 to quickly approve requests from TRN.953 report and assign bus and drivers.

TRN.911

- Transportation prints driver and office copies for newly approved orders

Driver Returns Paperwork with Details:

TRN.910

- Transportation completes the request, adds charge information, kilometer and bus information, as well as driver notes and statistics.

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

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 override if necessary.

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 (TRN.954, TRN.955)

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.

Session A - [24 x 80]
File Edit Transfer Appearance Communication Assist Window Help

7/25/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 07:51:21 QPADEV0002
CANSMS Bussing Request Maintenance Ref: TRN.910 .11
Trip#: 200100035 School: 023 BURLAND Booked: 3/22/01 User: DONNA
Approved: _____ User: _____
Completed: _____ User: _____
Ready to go? Y

Pickup: 030 BACK DOOR Date: 9/01/00 Time: 9:00 24 hr
Destination DONNA'S HOUSE Depart Destination : 16:00 clock

Students: 20 # Supervisors: 1 Grades: GRADE 8
Main Contact: DONNA BELL
Supervisors : _____

Instructions: NARROW DRIVEWAY

Type of Trip: FI FIELD TRIP Wheelchair Bus Req'd ? Y
Transport Equipment? Y Bus to Stay With Group? Y
Equipment Notes: SWIMMING POOL
Account: 9.1100.100.7110.23

Notes: _____ View Charges? N
Internal Note? N

Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel

03/020

Approved and Completed Information is 'look only' for schools.

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

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 where the trip destination is (use F4 to view a window 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: Mandatory. Complete who is in charge and names of supervisors. Indicate what grade level(s) of students will be on the bus.

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.

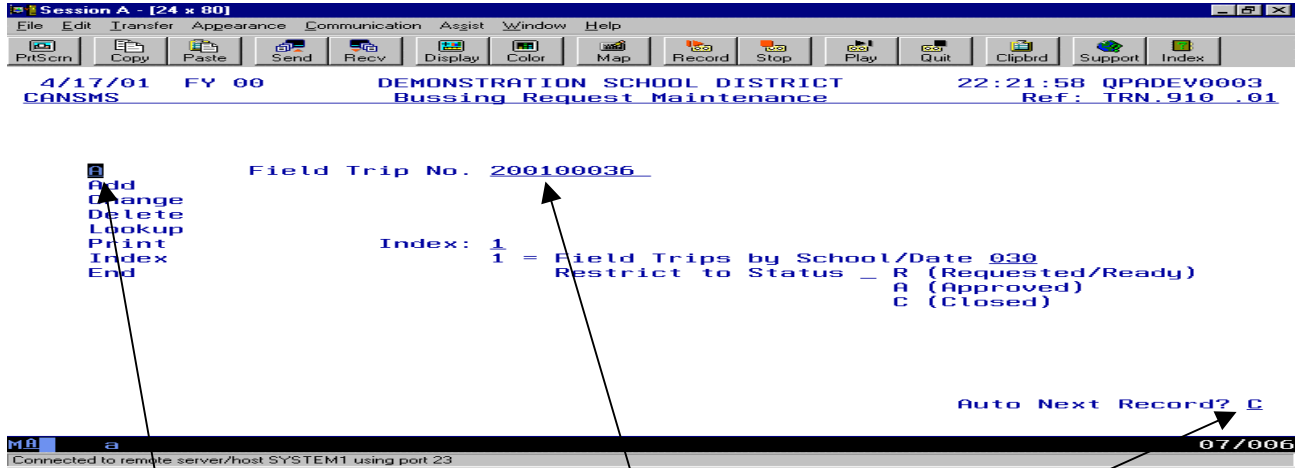
Bus to Stay with Group: Indicate whether bus must remain onsite until departure.

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.

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.

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.

Session A [27 x 132]

File Edit Transfer Appearance Communication Report Window Help

Page/Line 1/4
Columns 1 - 100
Page 1

File: ***** 2 *****
Control: *****
Print: *****

Display: Special File

Ref: TRN.955 DESTRUCTION SCHOOL DISTRICT
Date: 2/01/00 BUSING REQUESTS SCHOOL CHARGES REPORT
Time: 14:04:55 2/01/00 2/01/00

SD#	REQUEST#	TRIP DATE	DESTINATION-TWIR	CONTACT	STU	MRS	MRS	ACCOUNT	CHARGES	ACCOUNT	CHARGE
000	000100036	9/01/00	RESORT OF HAW & HUTURE	GENE SMITH	48	25	3-5				

***** SUBMIT ACCOUNT CHARGES *****

ACCOUNT	YEAR-TO-DATE BUDGET	*****	BUDGET	BUDGET SPENT	BUDGET	*****
*****	*****	*****	*****	*****	*****	*****
ACCOUNT	*****	*****	*****	*****	*****	*****
*****	*****	*****	*****	*****	*****	*****
*****	*****	*****	*****	*****	*****	*****
*****	*****	*****	*****	*****	*****	*****

F12=Exit F12=CANCEL F13=Left F12=Right F12=Home Keys