Introduction - What is Field Trip Request?

Friday, July 20, 2018   2:24 PM
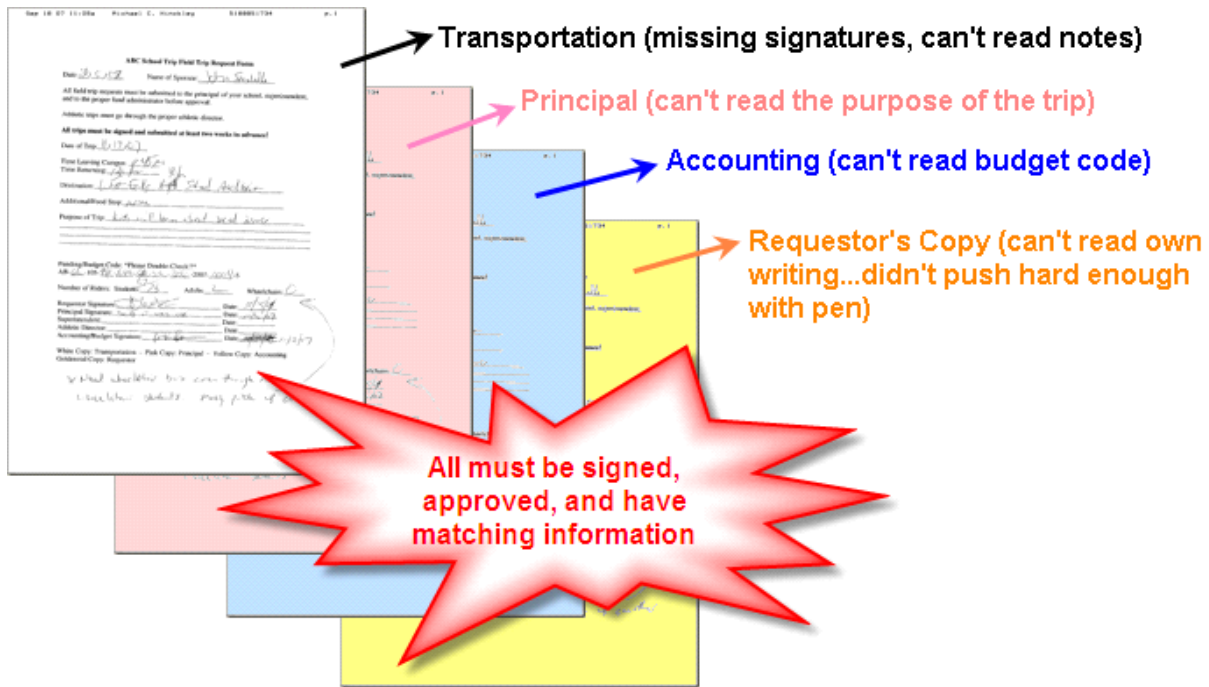
Welcome to Field Trip Request, powered by busHive™!

Field Trip Request is the online way to request, approve, and schedule field trips.

The old system of sending requests by fax, phone, and snail-mail can quickly become a nightmarish and convoluted mess to weed out.

The Old Way

Transportation (missing signatures, can't read notes)

Principal (can't read the purpose of the trip)

Accounting (can't read budget code)

Requestor's Copy (can't read own writing...didn't push hard enough with pen)

All must be signed, approved, and have matching information

The New Way - Using Field Trip Request!

With Field Trip Request, Your requests will move through your approval process in a much more timely, organized fashion.

Simply fill out the electronic request form and submit! The layout of the form is based on the paper transportation request you are already familiar with.

FIELD TRIP REQUEST

Home	New Request

Trip Request

New Trip (Athletic)

Don't forget the equipment.
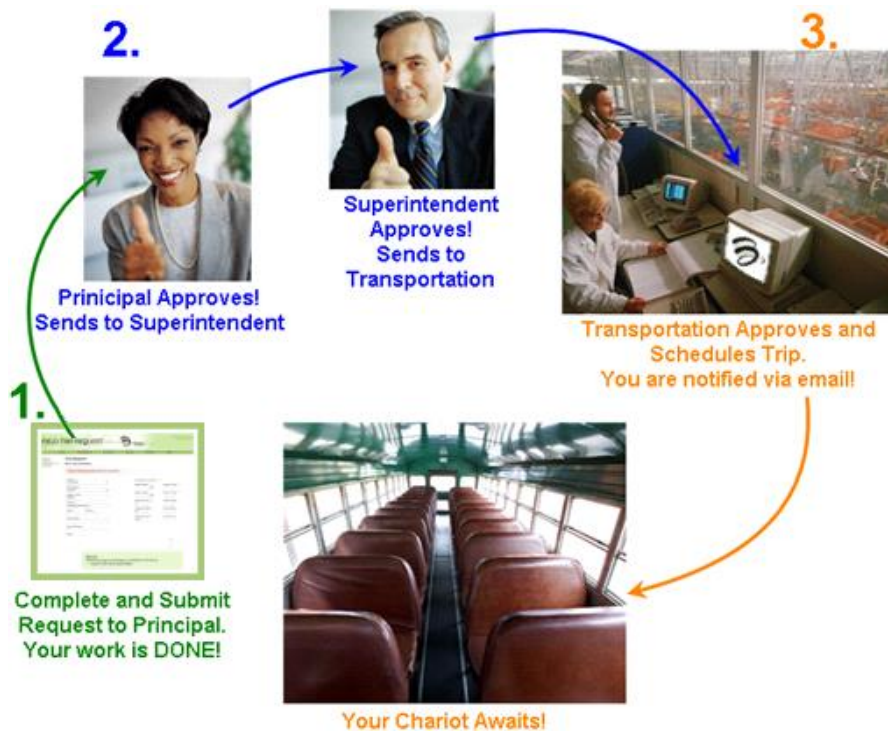
Activity: *
Basketball - Junior Varsity

Destination: *
Riverside Park

Purpose:
Tournament

The features of the online form are self-checking. The system can ensure that your request is 100% ready before you even submit it to the first approver. When you submit your request, the form is complete, properly filled out, within the scheduling parameters preset by the approvers, and perfectly legible to everyone in the chain.

2. Prinicipal Approves! Sends to Superintendent

Superintendent Approves! Sends to Transportation

3. Transportation Approves and Schedules Trip. You are notified via email!

1. Complete and Submit Request to Principal. Your work is DONE!

Your Chariot Awaits!

Once submitted, your request will automatically follow the approval process as dictated by your organization. No more guessing or worrying about where to send the form!

Because it is submitted electronically, the request instantly arrives on the screen of the approver; no need to wait for the form to be emailed

faxed or mailed. Approvers are automatically notified by email when there is a request awaiting their approval.

Every step of the way, you will be notified via email as to the status of your request. Once transportation approves the trip, it is scheduled, assigned, and ready for billing to the appropriate budget area or group. Want to know exactly where your request is right now? Simply log in. The status of all of your current requests will appear right on the Home page.

Enjoy your trip!

Click here to learn how to set up your Field Trip Request user account.

Notification Emails

Notification Emails

Every time there is a task that needs to be performed in Field Trip Request, the appropriate person is notified via email. These points include:

- Notification to each approver when a trip is ready for their approval.

- Notification to the original requestor as a trip moves through the approval chain.

- Notification to the original requestor if a trip comes back as 'Not Approved'. The system will give the requestor the chance to make changes, and resubmit the trip.

- Notification to the appropriate party when anyone's input is required.

Emails are the way all users are kept informed in the system. Emails do not, however, affect requests in any way. Responding to an email does not approve or change a trip request. Emails are also not necessary for proper operation of Field Trip Request. If all users were to log in on a regular basis, the emails would not be needed at all. Since no one (except maybe transportation) should be expected to log in every day, however, emails do serve a helpful purpose: they prompt the user to log in when necessary.

Keep in mind that for some users, preferences may be set to suppress some email notifications.

Setting Up My Field Trip Request Account

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1. Create your Field Trip Request Account

NOTE To Approvers: If you are set up to approve other users' trips, your account will already have been created by your transportation department. You will receive an email containing your password, and you can proceed directly to **Step 2**.

Click **Create New User**.

Field Trip Request Login

Email:

If you have not gotten a password via email, click **Create New User** *to set up your account.*

Password:

Login

>> Create new user

>> I forgot my password

All fields with a red asterisk* are required. If your **Organization Code** does not appear automatically, enter the **Organization Code** provided by your transportation department.

Create User

Organization Code: *
NY_Example_Code

First Name: *
John

Email: *
jsmith@myschool.k12.ny.us

Last Name: *
Smith

Phone:
555-1212

Create User

>> Return to Login

The **Organization Code** shown here is an example only. Contact transportation if your site's **Organization Code** does not appear.

Click **Create User**. The email address you have provided will be your user name, and your password will be emailed to you.

2. Log In

You may now log in to Field Trip Request using your full email address as your user name, and the password provided you via email.

Field Trip Request Login

Email:

jsmith@myschool.k12.ny.us

Password:

••••••

Login

>> Create new user

>> I forgot my password

3. Select Trip Types

Field Trip Request requires that you select which types of trips you will request.

Trip Types

You have not selected any Trip Types.

Select the types of trips you will request, then click **Save Types**.

☑ Academic

☐ After School

☑ Athletic

☐ Special Education

Save Types

Click **Save Types**. Your account is now set up and you may request trips.

NOTE For Approvers: You are already authorized to request any **Trip Types** that you approve. These types will appear grayed out and checked. You are automatically able to request trips from these types as well. Contact your transportation department to modify these **Approval Roles** if necessary.

Inserted from <https://www.fieldtriprequest.com/Help/General/setting_up_etr.htm>

Home Page

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When you first log in to Field Trip Request, you will be taken directly to the **Home** page.

Field Trip Request version 5.05

Simply by logging in, users can track the status of existing trips, view request history, even save commonly used request types as favorites. Users can also see any trips that have been sent back for more information (they will appear in bright yellow).

Logout

Click to log out of the Field Trip Request system.

Navigation Bar

Allows the user to access all areas of Field Trip Request. Click an item on the bar to be taken to that page of Field Trip Request.

Trips Not Scheduled (transportation level users only)

Displays all requests that have not yet made it completely through their approval process, but scheduled to run in a preset number of days. See the Field Trip Request settings manual available on the (Settings screen) for more information.

Trips Needing Approval Area (approvers only)

This area displays a list of all trips that are awaiting your approval. You should have received a notification email for each trip in the **Trips Needing Approval** area.

As you approve trips, they will disappear from your **Home** page entirely. See Approving and Not Approving Trips for more information.

My Trips Area

Displays a list of all trips you have requested. Regardless of status, requests will remain in your **My Trips** area until the departure date of the request has passed.

Favorites Sidebar

The box on the left of the screen contains a full list of saved **Favorites**. Click a **Favorite** to create a new request based on the details of the **Favorite**. See Favorites for more information.

Inserted from <https://www.fieldtriprequest.com/Help/General/home_page.htm>

Home Page Fields

Home Page Fields

Fields on the Home Page

Trip ID

The unique identification number of the request.

Click the **Trip ID** to open the request when you need to view the information, make changes. The original requestor can cancel the trip from here, and the approver can approve or disapprove the request.

Trip Details

The **Activity**, **Destination**, and **Depart** and **Return Dates** are the general details of the trip request. Use them as a reference to quickly find the request you are looking for.

Requested By

Displays the name of the individual who originally requested the trip. If a trip is sent back to the **Requestor** as **Not Approved**, that trip will appear on this individual's **Home** page highlighted in yellow (see below).

Status

Shows where the trip currently is in your approval process. For example, if the **Status** is "Waiting Approval by Superintendent", the superintendent has received a notification email concerning this trip and must approve it to the next level.

Statuses include:

Waiting for Approval By The request is waiting for the listed individual or role to approve the trip to the next level.

Waiting Scheduling The request has been received by Transportation and is awaiting their approval.

Scheduled The request has been fully approved and imported into busHive, Transportation's scheduling software.

Not Approved The request has been denied approval. The approver will send the request back to the requestor or someone who has already approved the trip, and the recipient will get a notification email. The requestor will also see the trip appear in bright yellow on their **Home** page.

Once the request is opened, an explanatory comment will appear at the top of the request and appropriate changes can be made to deem the trip acceptable.

Canceled Only the original requestor can cancel a request before the departure date of the trip. If the trip has not been scheduled and the departure date has passed, the transportation department may cancel it.

The canceled request will remain on the requestor's Home page until the original departure

date has passed.

Requesting and Approving Trips

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Trip requests can be generated using two methods, manually or by using **Favorites**. This section will deal only with creating new trip requests. To learn how to create a request using a **Favorite**, see Creating a Request from a Favorite.

Creating a New Trip Request

From the navigation bar, click **New Request**.

Select the trip type you wish to create from the list, if prompted, and click **Continue**.

Fill out the request form completely. Fields marked with a red asterisk * are required; the system will not allow the request to be submitted if these fields are left blank.

If there is a disclaimer at the bottom of the request, check the box **I agree to the terms stated above**.

Comment:

[Submit   ]

Depending on your setup, there may only be one choice in the **Send To** drop down. In this case, your trip will always go to the appropriate approver automatically. Select the appropriate approval office, then click **Submit**. You will be returned to the Home page, where there will be a new request ID.

Notification Emails

A representative from the approving office will receive an email notifying them that they need to review your request. Subsequent approvers will also receive such emails as the request moves up the chain. These emails are for notification purposes only, and it is not necessary for approvers to respond to them. As long as all requestors and approvers log into Field Trip Request and perform the duties outlined to them on the Home page, trips will move swiftly through the appropriate channels.

Inserted from <https://www.fieldtriprequest.com/Help/General/requesting_trips.htm>

Issues Submitting Trip Requests   Top Previous Next

Depending on the way your Field Trip Request system is set up, there are certain requirements that must be met by your request before it can be submitted. Besides missing or incorrect information in fields, there may be **Blackout - Min/Max Exemptions** or **Duplicate Request** issues. See Requesting an Exemption or Correcting Duplicate Requests, respectively, for more information.

Here are some things that may halt you from successfully submitting a trip request. To resolve these issues, correct the information, or change the parameters of your trip as needed. If neither option is practical, contact your transportation department for guidance.

Required Fields

Any fields marked with a red asterisk * are required. The request can not be submitted until all of these fields have information in them.

Blackout Dates, or Minimum and Maximum Number of Days

If transportation requires that trips must be submitted a few days ahead of time, the system may be set up to enforce this rule. Transportation can, for example, block submission of any trip request that one attempts to submit within seven days of departure.

There is also the possibility that a maximum number of days may be set. This would prohibit you from, for example, requesting a trip more than a year in advance. Certain dates or times may also be blacked out for travel by the transportation department.

Incorrect Type of Information in a Field

If a user is prompted for a start time, and they type "early" in the time field, Field Trip Request will not allow this trip to be submitted. The proper type of information must be entered into these fields.

In the **Time** fields, for example, users should enter the time in appropriate format ("10:30 AM" and not "1030am").

Confirmation Text

If there is a **Confirmation Text** at the bottom of the request, you must check the box labeled **I agree to the terms stated above**. Failure to read and accept the terms will result in non-submission of the request.

Turn Down By an Approver

If your trip is submitted successfully, it may still be disapproved later by an approver. You will be notified by email if your submitted request has been sent back as 'not approved'. See Correcting Trip Disapproval for more information.

Inserted from <https://www.fieldtriprequest.com/Help/General/requirements_of_trip_requests.htm>

CorrectingTrip Disapproval

Occasionally one of your trip requests may be turned down by an approver. You will be notified by email if this happens.

Log on to Field Trip Request. Any requests that require additional information from you will be highlighted in yellow. Click the **Trip ID** of the highlighted trip and read the non-approval comment at the top of the request, then correct the necessary information. If necessary, resubmit the trip with a reply comment in the **Comments** area at the bottom of the request that explains in detail why you require the trip to be approved as originally created.

Inserted from <https://www.fieldtriprequest.com/Help/General/trip_approvaldisapproval.htm>

Correcting Duplicate Requests

Checking and Correcting Duplicate Requests

Field Trip Request may be set to flag any trips that share the same **Departure Date**, **Destination**, and **Activity** as **Duplicate Requests**. When a request is submitted, you will be warned that this may be a duplicate request, and will be asked to compare the new trip with an existing one to confirm whether or not this is the case.

If the trip is not a duplicate with the one displayed, check **This trip is not a duplicate**. If the trip is a duplicate, make the needed changes to create it as a non-duplicate request, or click **Home** to cancel its creation.

Inserted from <https://www.fieldtriprequest.com/Help/General/duplicate_requests.htm>

Requesting an Exemption

Requesting Exemptions

When there are **Time/Date Blackout** or **Min/Max Day** rules that prohibit your trip request from being submitted, the system may offer you the option of requesting an **Exemption** from these rules.

Upon submission of such a request, a pop-up window will appear asking if you would like to be exempt from this rule, and to supply a reason why your trip request should be exempt.
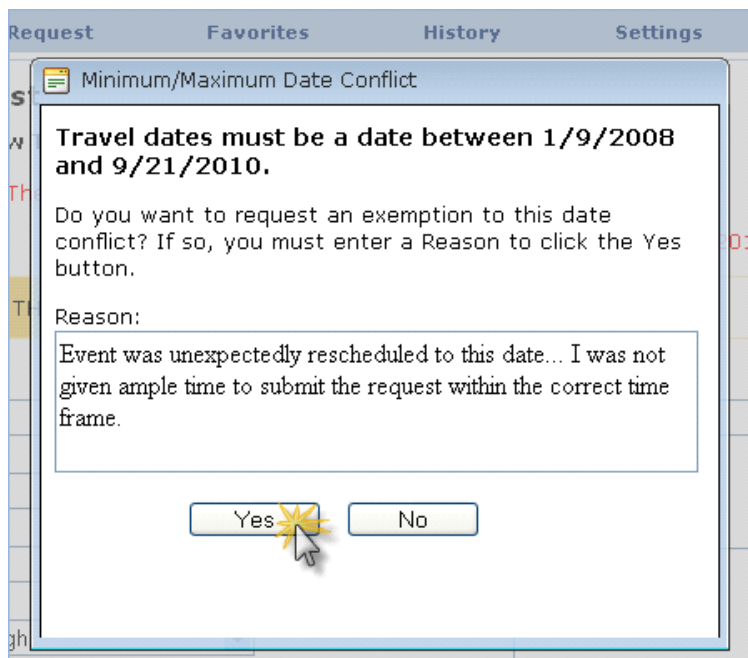
The request for exemption and reason will appear at the top of the request when it reaches its approvers. The request will be Approved or Not Approved based upon the reason you supply.

Note to approvers: Requests containing exemption notes cannot be mass-approved, they must each be individually opened and reviewed.

Inserted from <https://www.fieldtriprequest.com/Help/General/requesting_an_exemption.htm>

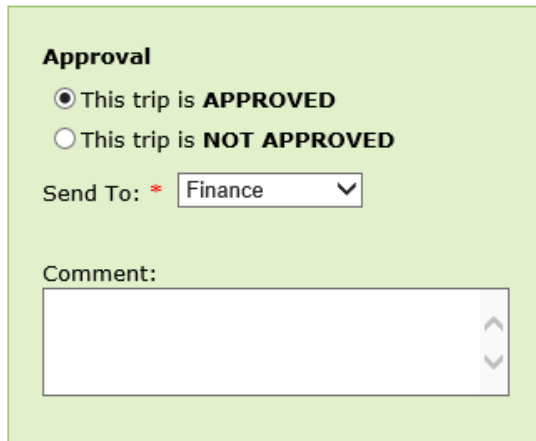## Approving and Not Approving Trips (For Approvers)

NOTE: This section shows information that is only pertinent to those who approve trips.

When a trip comes up for your approval, you will receive a notification email. Log on to Field Trip Request and the request to be approved will appear on your Home Page. There are two ways to approve a trip.

Manual Approval

From the **Home** page, a list of requests awaiting your approval will appear. To approve these trips one by one, simply click on the **Trip ID** of the trip you wish to review for approval.

At the bottom of the request, there will be a choice of **Approved** or **Not Approved**. Select one.

Approved

> If the trip is approved, select the next approval level from the Send To drop down. Click **Submit**.

Not Approved

> NOTE: When you send a trip back as 'not approved', this gives the requestor or lower level approver a chance to review the trip, make changes, and resubmit it. 'Not Approving' a request does not remove the request from the system.

> If for any reason you decide the trip must not be approved, select the person or office to return the request to. For example, if the purpose of trip is not thorough enough, you can send the trip all the way back to the requestor. If there is a discrepancy with the budget code, you may also elect to send it back to a lower level approver such as the principal. All available choices will be in the drop down after selecting **Approved** or **Not Approved**.

> Also, if the trip is not approved, a comment must be provided in the **Comment** box. Provide a reason why the trip is being turned down here.

Automatic or Line Item Approval

NOTE: This feature does not allow you to see the complete information of the trip request. Once a trip is approved, it will effectively be signed and date-stamped by you as **Approved**. Make sure any trips are ready for approval before proceeding.

NOTE: There are certain cases in which a request cannot be approved by the automatic method. These cases include requests with fields that require input by the approver, or if the requestor has asked for an exemption from a **Min/Max Days** or **Blackout** rule. See Requesting an Exemption to learn more about **Blackout** and **Min/Max Day** exemptions.

On the **Home** page, the list of requests awaiting your approval will be listed.

These features work in concert with each other to provide fast approvals.

Check All/None

> Click **All** to set the **Approval** check box of all listed trips to checked. This makes all requests available for immediately approval.

> Click **None** to uncheck all **Approval** check boxes.

Approve Check Box

> Checked, the selected trip is marked for immediate approval upon clicking the **Approve Checked** button. Unchecked, it will not be immediately approved by this method.

Next Approver Drop Down

> If a choice of next approver must be made, all available choices for each trip will be available in this drop down. When a trip is line item approved, it gets sent to the office displayed.

Approve Checked Button

> When the **Approve Checked** button is clicked, all trips with the **Approval** check box checked will be submitted to the office shown in the **Next Approver** drop down.

Trips cannot be set to **Not Approved** using this feature. To send a request back as **Not Approved**, use the manual method.

Favorites

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Favorites

Favorites provide a means to use a saved trip request to create a similar new request.

Creating a Favorite

Submit a 'Parent' Trip Request

> Favorites must be created from a previously submitted trip request. Use an existing request, or create the first trip request as you normally would and submit it. Requests from either your own **Home** page or the **History** page can be used.

Open the Request and Name the Favorite

> Open the previously submitted request by clicking the **Trip ID**.

> With the details of the request visible, name the favorite and click **Create Favorite**.

> The favorite is now saved, and will appear in the Favorites box. Click **Home** to exit the current request.

To submit a request using the new Favorite, see Creating a Request From a Favorite.

Creating a Request from a Favorite

There are two ways to request a trip using a favorite. You may click the saved favorite on the left side of the Home page, or you may go to the Favorites page.

From the Home page, a full list of all saved favorites will appear in the **Favorites** box on the left of the screen. Select it from here.

On the **Favorites** page, a more detailed description of the saved favorites will be available, including the Activity, Destination, and the date the favorite was originally saved.

Click the **New Request** link adjacent to the favorite you wish to use.

Creating the Trip

Simply click the favorite you wish to use, and a new trip request will be created. Review the request carefully, and be sure to modify the date, destination, and any other information that is different from the saved favorite.

Submit the new request.

Inserted from <https://www.fieldtriprequest.com/Help/General/creating_a_request_from_a_favo.htm>

Deleting a Favorite   Top Previous Next

From the Favorites page, click the **Delete** link adjacent to the Favorite to be deleted.

Favorites cannot be edited or renamed. To make changes, delete the favorite and re-create it.

Inserted from <https://www.fieldtriprequest.com/Help/General/deleting_a_favorite.htm>

History

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History

The **History** page has two purposes. First and foremost, it allows users to look up requests that have already departed, for reference. Secondly, it makes these requests available for the creation of a Favorite. See Favorites for more information.

Looking Up Trips in History

Click **History** from the main page.

There are two ways to search for trips: by departure date or by Trip ID.

Search for Trips by Departure Date

Select the **Search by Depart Date** radio selection. Select the departure date or date range for the trips you wish to see. Trip requests are accessed here by departure date, not the date they were requested.

Select the type of trip you wish to look up in the **Trip Type/Approval Roles** drop down. Trip approvers may also select an approval role that the trip has passed through. To see requests from all types and roles, select **<All>** from the drop down.

If you are only looking for trips that you have worked on, check **Show only trips I requested or processed**. Otherwise, leave this setting unchecked. The trips you are allowed to view may be limited by the settings put in place by your transportation provider.

Click **Search**. All trips that match the criteria you have searched for will appear. Basic information about the trip will be displayed and you will have the option of clicking the **Trip ID** to see the full request if desired.

Search for Trips by Trip ID

Select the **Search by Trip ID** radio selection.

Enter the Trip ID in the field provided, then click **Search**. The request will only appear if it is a request you have created or approved, or if you are an approver in a role through which the request was approved.

Depending on the departure dates you select for your search, current trips with future departure dates may also appear. You can check on the status of any of these trips by viewing the information in the **Status** field.

The **Re-Import** feature will be available only to transportation-level users. Click the link on the transportation Settings page to view Transportation Help.

Settings

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Settings

Once your account is created, you can modify your password, phone number, and the spelling of your name. There is even a way to modify the types of trips you are set up to request.

To learn about changing your password, see Changing Your Password.

For help with changing the spelling of your name or phone number, see Changing my User Profile.

To learn about Trip Types, and how to set up your account to request certain types of trips, see Selecting Trip Types.

Inserted from <https://www.fieldtriprequest.com/Help/General/settings.htm>