

Template Applications – Field Trip Request


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Template Applications – Field Trip Request

Introduction

This two-page application is designed to manage field trip requests. The first page collects information about the trip. The second page is for the request approval and management.



Field Trip Request

Instructions: Please provide all information requested.
Complete information will help us properly plan a safe trip for all involved.

General Information

Site Name:	<input type="text"/>	Requestor:	<input type="text"/>
# of Students:	<input type="text"/>	Email:	<input type="text"/>
# of Chaperones:	<input type="text"/>	# of Vehicles Requested:	<input type="text"/>
Total Passengers:	<input type="text"/>	Request Date:	<input type="text"/>

Departure / Return Information


Leaving From:	<input type="text"/>	Departure Date:	<input type="text"/>
Destination:	<input type="text"/>	Return Date:	<input type="text"/>
Departure Time:	<input type="text"/>	Return Time:	<input type="text"/>
Trip Escort:	<input type="text"/>		

Rest / Meal Stops

Rest Stop?	<input type="radio"/> Yes <input type="radio"/> No	Location:	<input type="text"/>
Meal Stop?	<input type="radio"/> Yes <input type="radio"/> No	Location:	<input type="text"/>

Details

Purpose of Trip:	<input type="text"/>
Special Needs:	<input type="text"/>
Special Instructions:	<input type="text"/>



Field Trip Request

Principal Approval is Required

☐ I APPROVE THIS REQUEST ☐ I DO NOT APPROVE THIS REQUEST

Decision By:	<input type="text"/>	Date:	<input type="text"/>
(Principal Name)			

Comments:

Transportation Department Use

☐ I APPROVE THIS REQUEST

Approved By:	<input type="text"/>	Date:	<input type="text"/>
(Transportation Manager Name)			

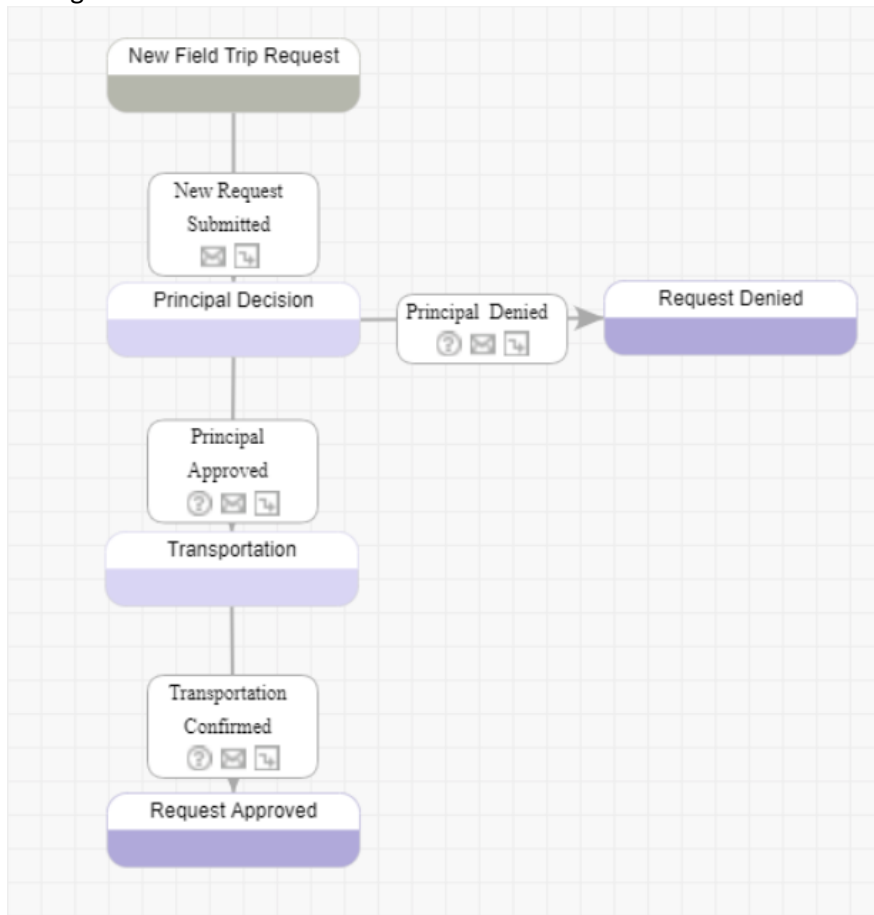
☐ School Bus ☐ Regular Charter Vehicle ☐ Other - Please Specify

Comments:

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Workflow Logic

All requests will require approval by the School Principal, who may deny the request. Once approved, the request moves to the Transportation team to manage and confirm the transport arrangements.



Important notifications in this process are set up to recur after a certain period of working days. The requester is notified of progress through the process.

Notable Behaviors

On page 1, there are behaviors associated with the trip 'Departure' and 'Return' dates, so the departure date cannot be after the return date.

On the Submit button, there is a mandatory check to ensure all fields are completed before submission. There is also logic to ensure that rest and meal stop details are included if either is selected, logic to ensure that a maximum ratio of students per chaperone is controlled, and logic when the departure and return dates are the same so that the departure time cannot be after the return time.

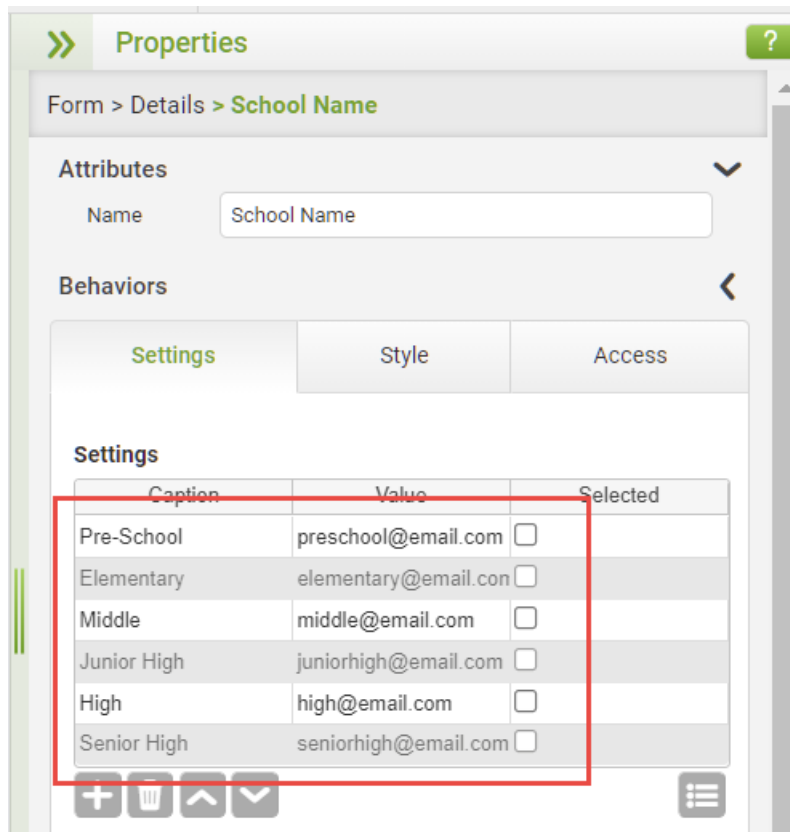
On submission of page 2, there are various conditional mandatory checks in place to ensure that the Principal and Transportation Manager enter their name and, where necessary, other information, including comments.

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Installation Instructions

A few modifications will be required after the application has been imported into your system.

In the School Name drop-down, we have included basic school names and corresponding email addresses.



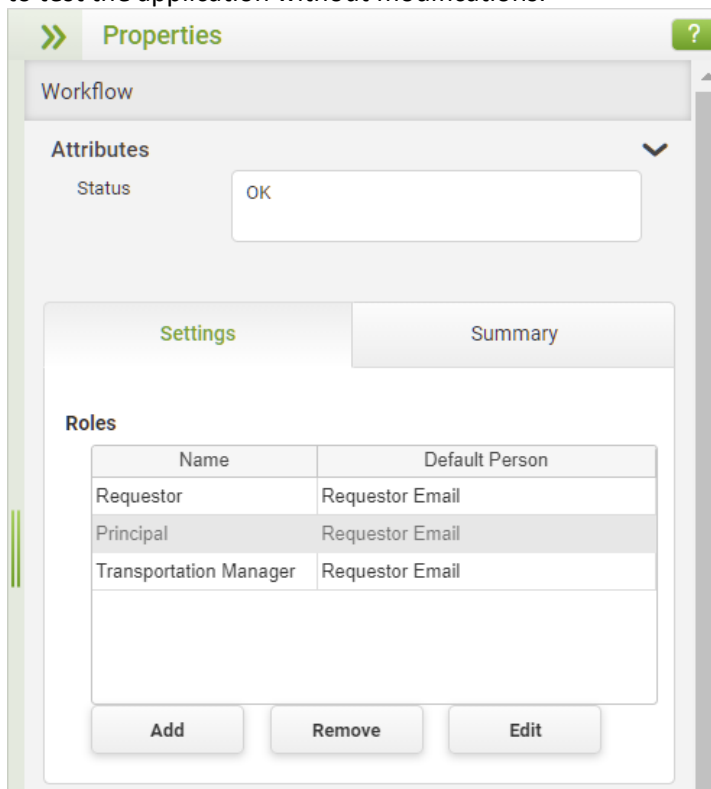
The screenshot shows the 'Properties' window for the 'School Name' attribute. The 'Settings' tab is active, displaying a table with the following data:

Caption	Value	Selected
Pre-School	preschool@email.com	<input type="checkbox"/>
Elementary	elementary@email.com	<input type="checkbox"/>
Middle	middle@email.com	<input type="checkbox"/>
Junior High	juniorhigh@email.com	<input type="checkbox"/>
High	high@email.com	<input type="checkbox"/>
Senior High	seniorhigh@email.com	<input type="checkbox"/>

Change these entries to reflect the correct school names and email addresses for the Principals of those schools.

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The Principal and Transportation Manager Roles link to the Requestor Email field, making it possible to test the application without modifications.



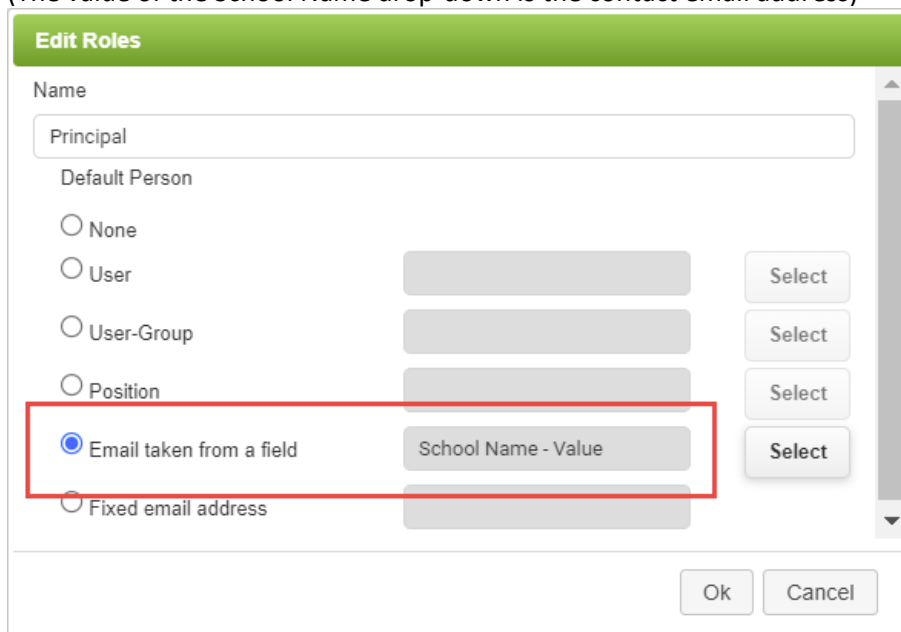
The screenshot shows the 'Properties' dialog box for a workflow. The 'Attributes' section has a 'Status' field set to 'OK'. The 'Settings' tab is active, showing a table of roles. The 'Summary' tab is also visible. Below the table are 'Add', 'Remove', and 'Edit' buttons.

Name	Default Person
Requestor	Requestor Email
Principal	Requestor Email
Transportation Manager	Requestor Email

In normal circumstances, these two roles would need to be re-linked.

Select and edit the Principal role from the workflow diagram and re-link to the Value of the School Name drop-down. Click OK to confirm.

(The value of the School Name drop-down is the contact email address)



The screenshot shows the 'Edit Roles' dialog box for the 'Principal' role. The 'Name' field is set to 'Principal'. The 'Default Person' section has five radio button options: 'None', 'User', 'User-Group', 'Position', and 'Email taken from a field'. The 'Email taken from a field' option is selected and highlighted with a red rectangle. To the right of this option is a text field containing 'School Name - Value'. To the right of the text field is a 'Select' button. Below the radio button options is a 'Fixed email address' option. At the bottom right are 'Ok' and 'Cancel' buttons.

Name: Principal

Default Person

- ☐ None
- ☐ User
- ☐ User-Group
- ☐ Position
- ☒ Email taken from a field
- ☐ Fixed email address

School Name - Value

Select

Ok Cancel

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The Transportation Manager role, currently linked to the Requestor Email field, will also need to be changed.

Edit Roles

Name
Transportation Manager

Default Person

☐ None

☐ User 1

☐ User-Group

☐ Position 2

☒ Email taken from a field 3

☐ Fixed email address 3

Select an alternative option to link the Transportation Manager role to the Transportation Manager. Your options here would depend on what you have set up in your system but will include the following:

1. If your Transportation Manager has a license in your account (Full, basic, or limited), you can link directly using the User option. Select the 'User' option, click the corresponding Select button, and choose from the list of users.
2. If you have set up a Transportation Manager position within your system and have selected the correct licensed user to occupy that position, you can link to that position. Select the 'Position' option, click the corresponding Select button, and choose from the list of positions.
3. If neither of the above is possible, you can link to the Transportation Manager's email address. Select the 'Fixed email address' option and enter the email address in the corresponding box. In this scenario, the Transportation Manager doesn't require a license (Full, basic, or limited) in your system.

Click OK when done.

The graphic 'Field Trip Request' header is included as a picture on each page and can be removed if you prefer to use alternative graphics.

Mobile Version

This application is not enhanced for mobile use.