Full TripDirect User Manual

Version 1.0

SchoolDude.com, Inc.

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TripDirect Table of Contents:

Welcome and Thank You for Choosing TripDirect!

With this product, we've taken the hassle out of planning your educational facility's next trip. You will find it simpler to streamline the educational trip workflow process from start to finish because we've covered everything from trip request and approval to scheduling vehicles and drivers. By utilizing TripDirect at your educational facility, you eliminate the inconvenience of chasing down all the different people and services that make educational trips happen. TripDirect puts them all in one place for you, which is not only more cost-efficient, it also saves valuable time.

In this manual, you'll find everything you need to know to keep you behind the wheel of your educational trip planning process. You'll learn about your role in TripDirect, what that role entails, and where you need to go to get started. We'll walk you through the data-entry process, how to find the information you need, and how to access up-to-date reports on every aspect of your trip through graphs and tabular reports in HTML or PDF format.

To make instructions as easy to follow along as possible, you will see page names and important words written in **bold** font while actions you should take (links to click) at any given point as well as chapter headings will be shown in red. Keep an eye out for "SchoolDude Says" tips and notes, included along the way to make things as easy and understandable as possible.

For your convenience, this manual includes a brief overview of the roles in TripDirect as well as a glossary of terms and symbols (SchoolDude Vocabulary) at the very end for easy reference. Please take a moment to look over the glossary before getting started to familiarize yourself with some of the terms and symbols that you'll see throughout your use of TripDirect. There is also a quick reference page to guide you to any help you might need via telephone, email, or live online chat should you still have any questions.

We here at SchoolDude will be there all the way along the road to planning your educational facility's trips, retreats, and conferences. Happy travels!

TripDirect Roles: Who's Who in TripDirect

TripDirect users are divided up into individual roles where each role has different capabilities and responsibilities. Each role has its own home page that acts as a gateway into TripDirect. Some roles have fewer tabs on their home page while others have limited access to various links. Below are listed all the roles in TripDirect, what they are and aren't able to do, and who is usually assigned to each role.

Administrator: This person is the only one (or ones) to have access to the entire system. They can see everything that is going on from upcoming trips to who might be scheduled to provide food or maintenance service. They have the ability to set up the account information, approve or decline any trip requests, and view and edit any schedules or information recorded on the site. They are also the only role that can "activate" a trip request. There can be as many Administrators for an account as needed.

The **Site Administrator 1** is an approval role for a location. They can view all upcoming trips scheduled from the Home page or the Calendar tab, but will only see requests for their assigned location. They then have the option to edit, approve, or decline. They can also create their own trip requests.

Service Providers only have access to the tasks that are assigned to them. They can view a summary version of the request form and can use the calendar to see all scheduled trips.

The **Requester** has access, through MySchoolBuilding.com, to a request form as well as a summary page where they can see the current status of their requests. These are usually teachers.

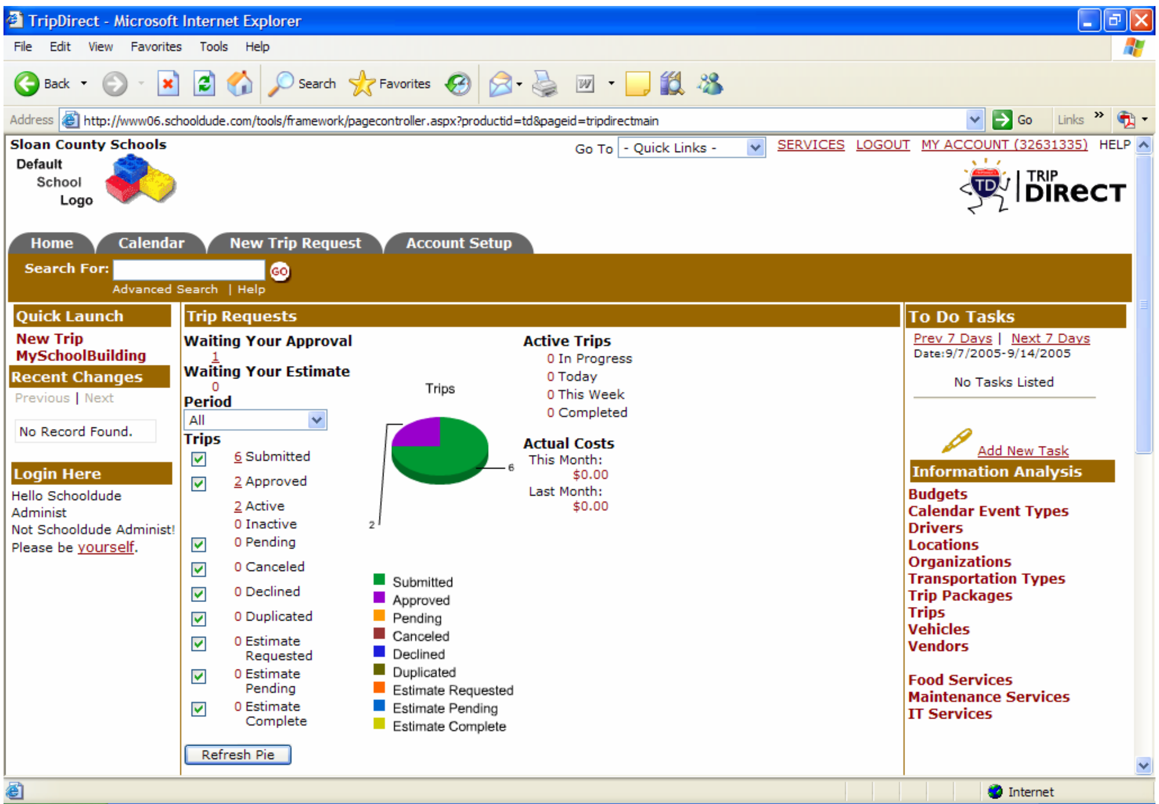
The **Driver**, like the service provider, only has access to the tasks that are assigned to them. They can view a summary version of the request form and can use the calendar to see all scheduled trips.

Administrator Guidelines

I. Welcome to the Home Page! Now What?

(A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your **Home** page. It should look something like this:



*(Note: You won't see the pie chart until after the first trip request has been submitted.)

Your **Home** page has several components. Across the top of the page, there are four tabs reading: "**Home**", "**Calendar**", "**New Trip Request**", and "**Account Setup**". Currently, you are looking at the **Home** page which contains the following:

1. **Quick Launch** gives you shortcuts to create a New Trip or to reach the MySchoolBuilding.com page.

2. **Login Here** shows who you're logged in as. Here, you can log in as yourself if you are logged in incorrectly.

3. **Recent Changes** shows you any changes made in a time period which you will specify as "recent" during the Account Setup process. This could be a number of hours or days.

4. **Trip Requests** contains information on the status of all requested trips. The number of trips that are submitted, approved, pending, canceled, declined, duplicated, and estimated are all listed and represented on a color-coded pie chart (which appears after the first trip request has been submitted). Trips awaiting your approval or estimate are listed here, as well as Active trips and Actual Trip Costs for this month and the last.

5. **Upcoming Events** tells you of any trips within the next week, along with trip-related details such as departure and return times, total number of students attending, name of organization taking the trip, etc. Upcoming Events can be sorted by Location or Organization by choosing which one you wish to see from the drop-down boxes provided.

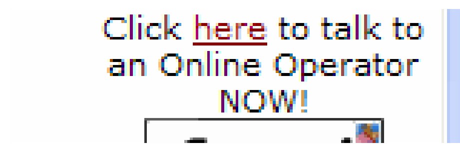
6. **To Do Tasks** lets you know of any maintenance, food, or IT services that will be needed for trips occurring during the next week. This section will act as a reminder not only to you, but also to those service providers who log on to see what needs to be done in the week to come.

7. **Information Analysis** provides important links for all the major components of planning a trip:
    - Budgets
    - Drivers
    - Locations
    - Organizations
    - Transportation Types
    - Trip Packages
    - Trips
    - Vehicles Vendors
    - Food Services
    - Maintenance Services

- IT Services

Once you have entered all of your educational facility's account information, clicking on any of these links will allow you to access lists, manage codes, and view reports and graphs on the selected information type.

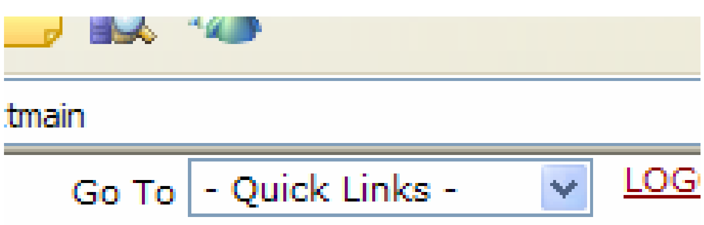
8. HELP links are available in both the top and bottom right-hand corners of your **Home** page. Clicking on the Help link in the top right-hand corner will take you to the TripDirect product manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude Support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:



To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The Email link looks like this:

A blank email form will pop up, already addressed and ready to use.

9. The Quick Links provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from TripDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's **Home** page automatically. Quick Links is located at the top of the Home page screen, near the right-hand corner and looks like this:

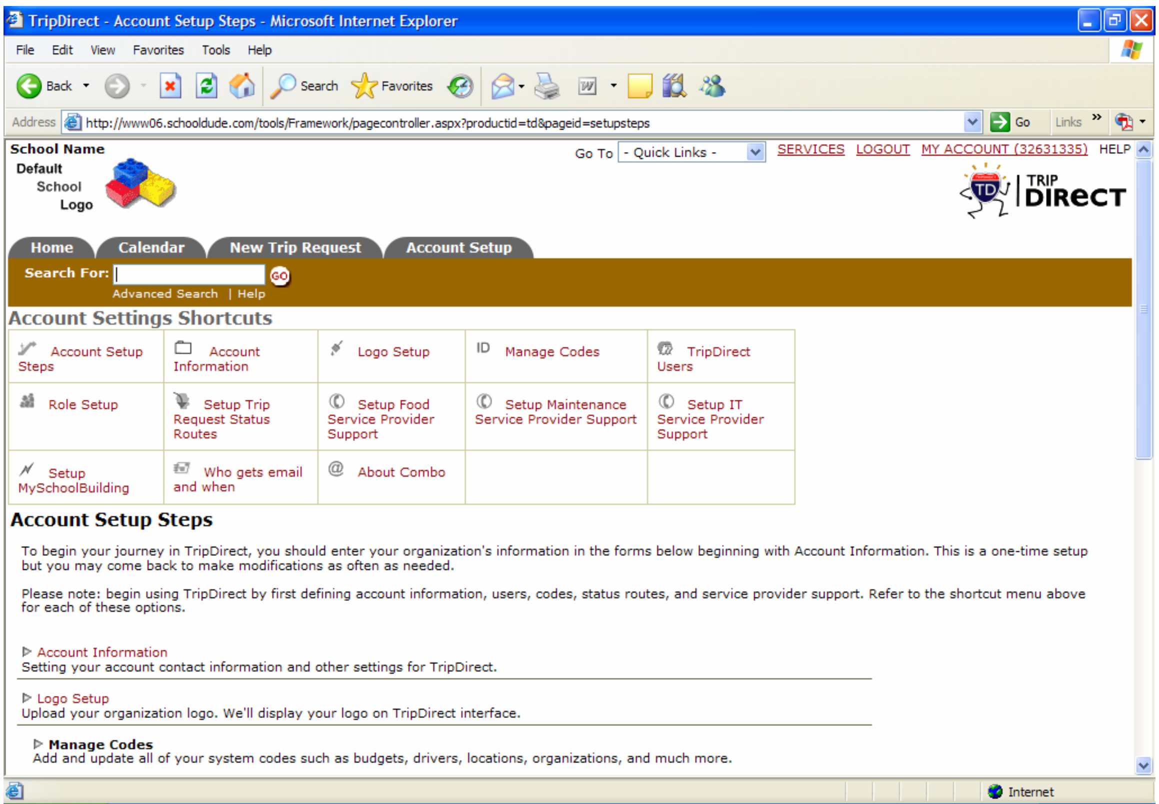


II. Account Setup: Tell Us All About Yourself!

The first thing you will need to do as Administrator upon logging in for the first time is to set up all of your account information so that all options and fields will be filled in and available for anyone trying to request a trip.

Below are the steps that you'll need to follow **in the order that will assure that the information you need is there when you need it**. Keep in mind that fields marked with a ☑, both in the system and in this manual, are required fields and those will be covered first.

1. **Getting Started**: Click on the Account Setup tab at the top of the **Home** page. The **Account Setup** page should look like this:



You can scroll down and follow the step-by-step instructions on this page or use the shortcuts at the top of the page to fill in the information fields for steps 2—14.

2. ☑ **Account Information:** Click on the Account Information link and fill in information regarding **Organization**, **Fiscal Year**, **Date Ranges**, and **Miscellaneous** preferences.

- **Organization Name**: Enter your educational facility's name here.

- **Address, City, State/Province, Zip Code, Country**: Enter your complete address here. This is the address that will appear on all of your invoices.

- **Phone**: Enter your phone number and area code here. This is the phone number that will appear on all of your invoices.

- **Fiscal Year**: Enter the beginning and ending dates of the current fiscal year here.

- **Request Range**: To show how much notice that a Requester must give prior to the trip departure date, enter the minimum and maximum number of "days before trip" here.

- **Event Notification**: Enter the number of days that service providers are to be notified before an event takes place here.

- **Show Changes Made in the Last _____ Hours**: Within how many hours would you like recent changes to show?

- **Miscellaneous**: Indicate here if you would like to have a weather icon available on the calendar to check the forecast before a trip takes place. If you are the comptroller for your account, this will be indicated in this section as well. *(See "SchoolDude Says" below.)*

- Click Save at the bottom of the page.

SCHOOLDUDE SAYS: The comptroller serves as the "safety net" of trip request routing. Any request the system doesn't know what to do with gets sent to the comptroller. Also, if no service provider support is set up for a task, the task gets assigned to the comptroller.

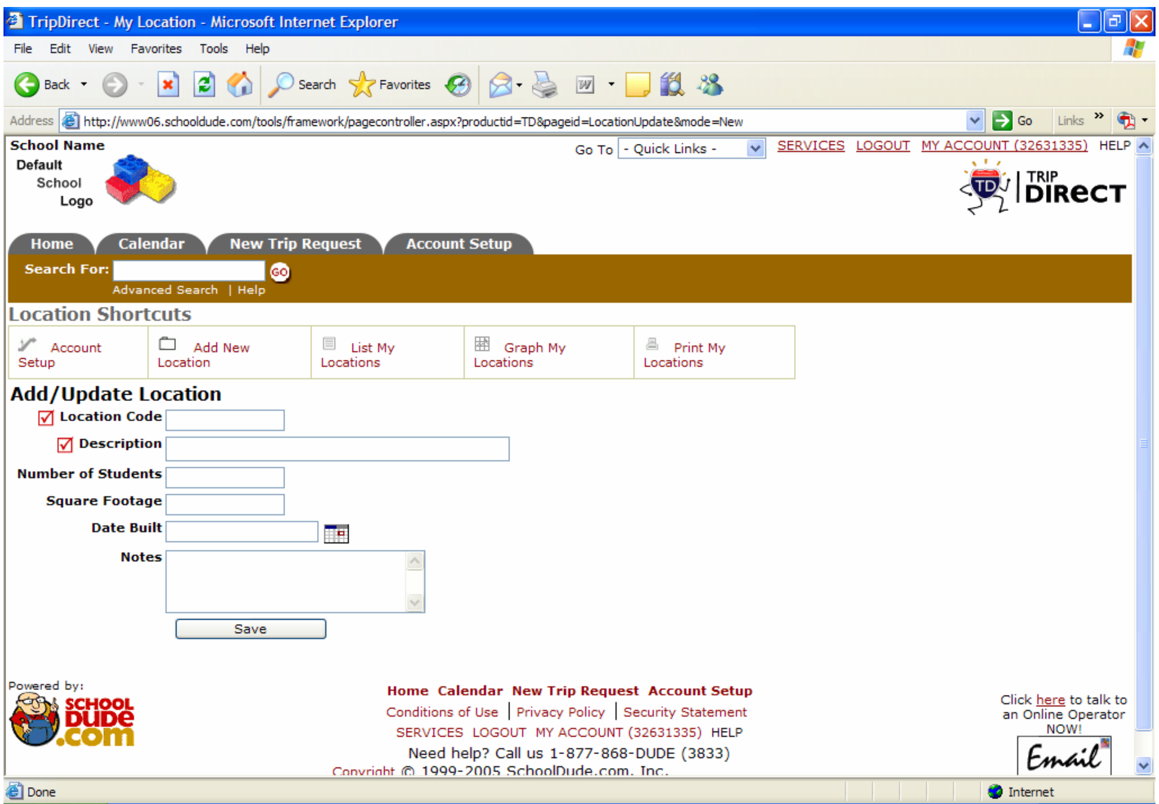
3. ☑ **Locations:** To enter each school in your district or location on your school's campus, click on the Locations link on the **Account Setup** page and follow the steps below:

- Click the Add New Location link.

- On the **Add/Update Location** page, assign a code to your location and enter it in the **Location Code** field. (An example of a Location Code would be "THS" for "Triton High School").

- In **Description**, enter the name of the location.

- Enter any further information you have including, number of students at each location, square footage, and any notes you wish to make and click Save.



The words "Record saved successfully" should appear in red near the top, just above the information fields that you've filled in, once the page refreshes. To continue adding locations, click the Add New Location shortcut and repeat above steps. You can see the information you've entered by clicking on the List My Locations shortcut.

To delete a Location, click on the Locations link from the **Account Setup** page. Click on the name of the location on the **My Locations** page, scroll to the bottom of the **Add/Update Location** page, and click Delete. Confirm by clicking OK in the box that will pop up and you will immediately be taken back to the **My Locations** page which will show that the location has been deleted.

SCHOOLDUDE SAYS: You will not be able to delete a location once costs have been assigned to it.

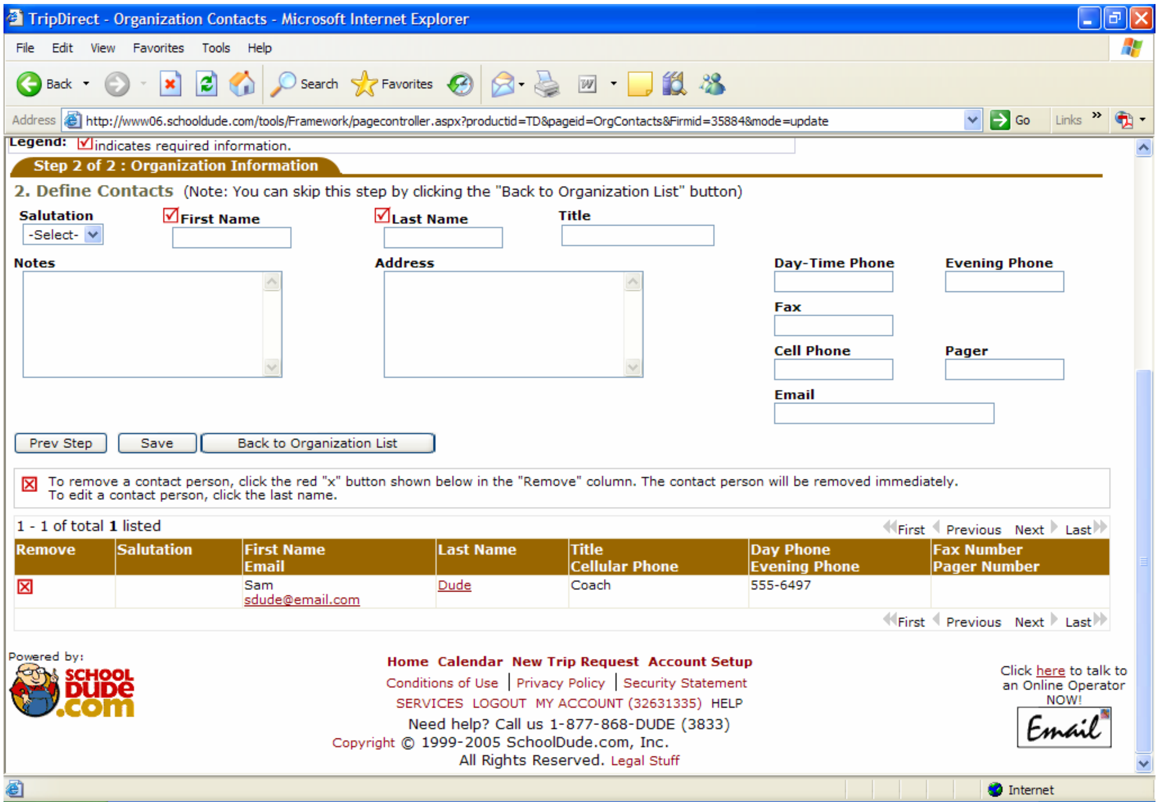
4. ☑ Organizations: **"**Organizations" are whatever groups will be taking trips, either internal or external. Organizations could be each grade or even each class at a school or they could be student clubs and faculty organizations on different campuses—it's really up to you. As Administrator, you can add organizations at any time but they have to be in the system for any other users to access them. It's a good idea to go ahead now during the Account Setup process and add the organizations that you know will be used frequently.

To start adding Organizations, click on the Organizations link from the **Account Setup** page.

- Click Add New Organization.
- Enter all required (☑) information, including Organization Name and Address.
- Decide which kind of invoicing and payment type you would like to use and click the button next to Charge Back, Payment, or No Charge, and then Invoice or Contract.
- Choose whether or not this Organization is currently Active or Inactive.
- Select the Organization Type. If you haven't created any Organization Types, you can do so now. Simply click on the Add New Organization Type link, enter the type of organization (club, athletics, etc.) in the box that will pop up, and click Save.
- Fill in the following optional fields if desired: FEIN, Sales Tax Exemption No., whether or not the organization is tax exempt, and any notes you wish to include.
- Click Next Step.
- The next step in this process is to **Define Contacts**. You can fill in these fields to include contact information for this organization or you can choose to skip this step by clicking on the Back to Organization List button. To use this step, however, enter the name and contact information of the organization contact here, including any notes, and click Save.

Keep in mind: Notes and Addresses are contact-specific.

Once saved, your contact's name and information will be listed at the bottom of this page. You can delete a contact at any time by clicking on the ☒ on the left-hand side of the contact list, just before their name.

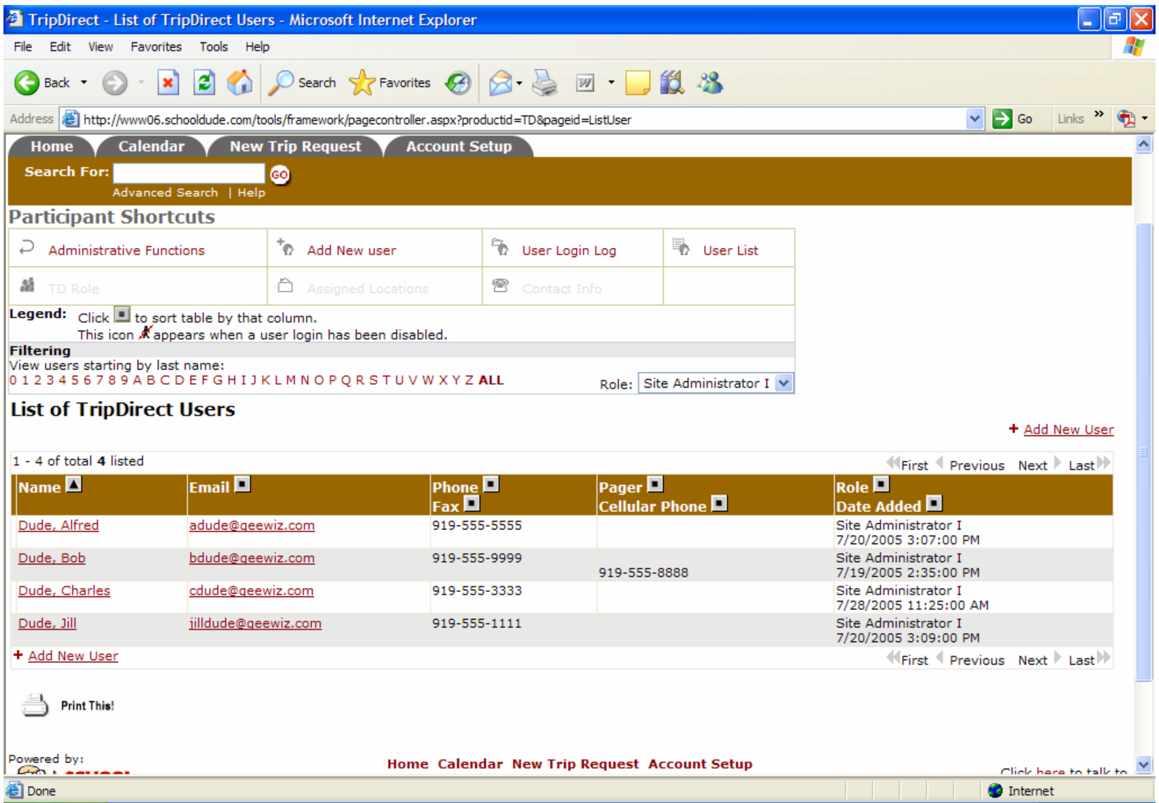


To edit contact information, click on that contact's last name, which appears in red in the contact list.

To access a contact via email, simply click on that contact's email address, shown in red, and a blank email form will pop up, ready to use.

5. ☑ **Users:** This is where you will identify all TripDirect and MySchoolBuilding.com users, their roles, and their locations. You will also create a username and password for each user. Click on the TripDirect Users link on the **Account Setup** page to get started.

- Click Add New User link in one of three locations: Under Shortcuts, on the far right-hand side of the screen just below the words "List of TripDirect Users", or on the left-hand side of the screen just below where the users will be listed.

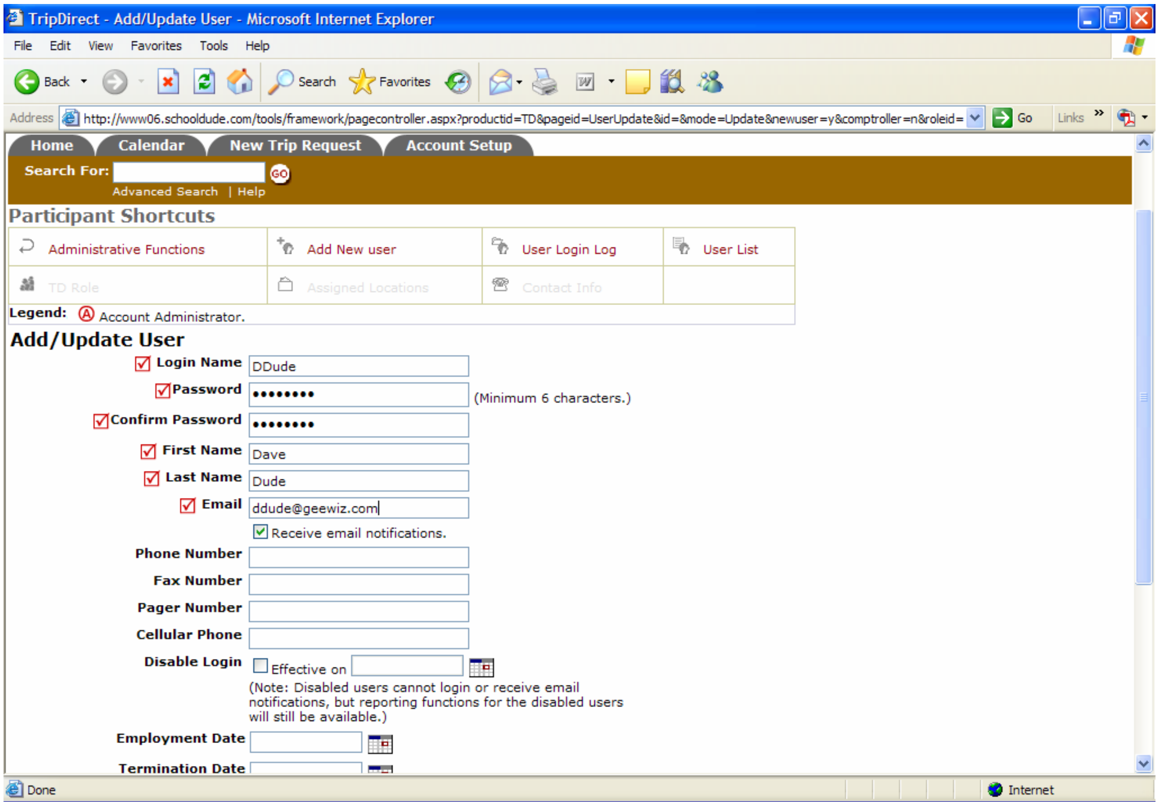


- Define the user's role as **Administrator**, **Site Administrator 1**, **Requester**, or **Service Provider**.

- If this user will be the account comptroller, indicate by clicking the box beneath the word **Comptroller**.

- Click Next Step.

- Enter the user's information into the fields, remembering that fields marked with ☑ are required.



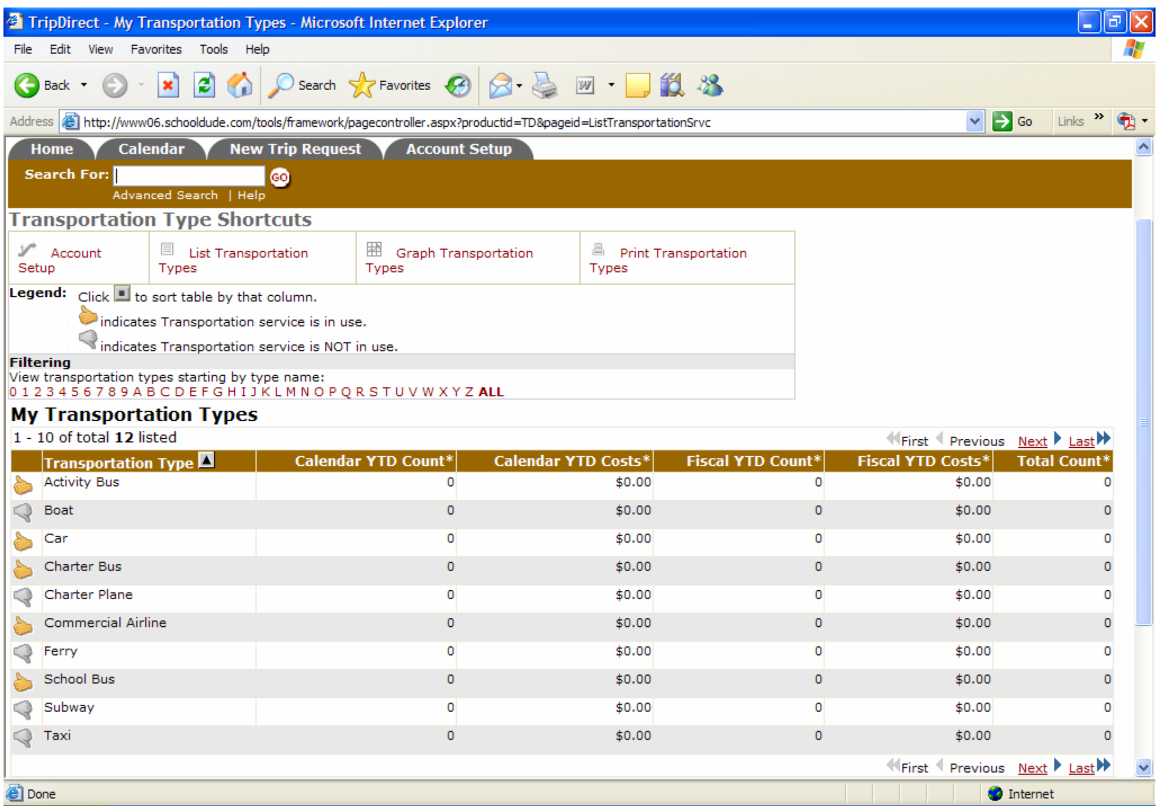
- Create a password for this user.
- Click Save/Next Step.

To delete a user, click on the TripDirect Users link from the **Account Setup** page and click on that user's name. Scroll to the bottom of the **Add/Update User** page and click the Delete button. Confirm by clicking the OK button in the box that pops up and you'll immediately be taken back to the list of users which will show that the user has been deleted.

6. ☑ **Transportation Types:** This field allows you to choose what types of transportation will be available for use by your educational facility and therefore, what transportation types requesters have to choose from.

When you click on the Transportation Types link from the **Account Setup** page, you will be taken to a page that lists transportation options (activity bus, commercial airline, train, etc.). Next to each transportation type, you will notice a gray thumbs-down icon ( ). To activate the transportation types you wish to use and make them available for requesters to choose when planning a trip, click on the icon to change it from a gray thumbs-down ( ) to a yellow thumbs-up ( ).

When you finish the first page of ten options, click Next at the bottom of the page to continue on to the remaining transportation types.



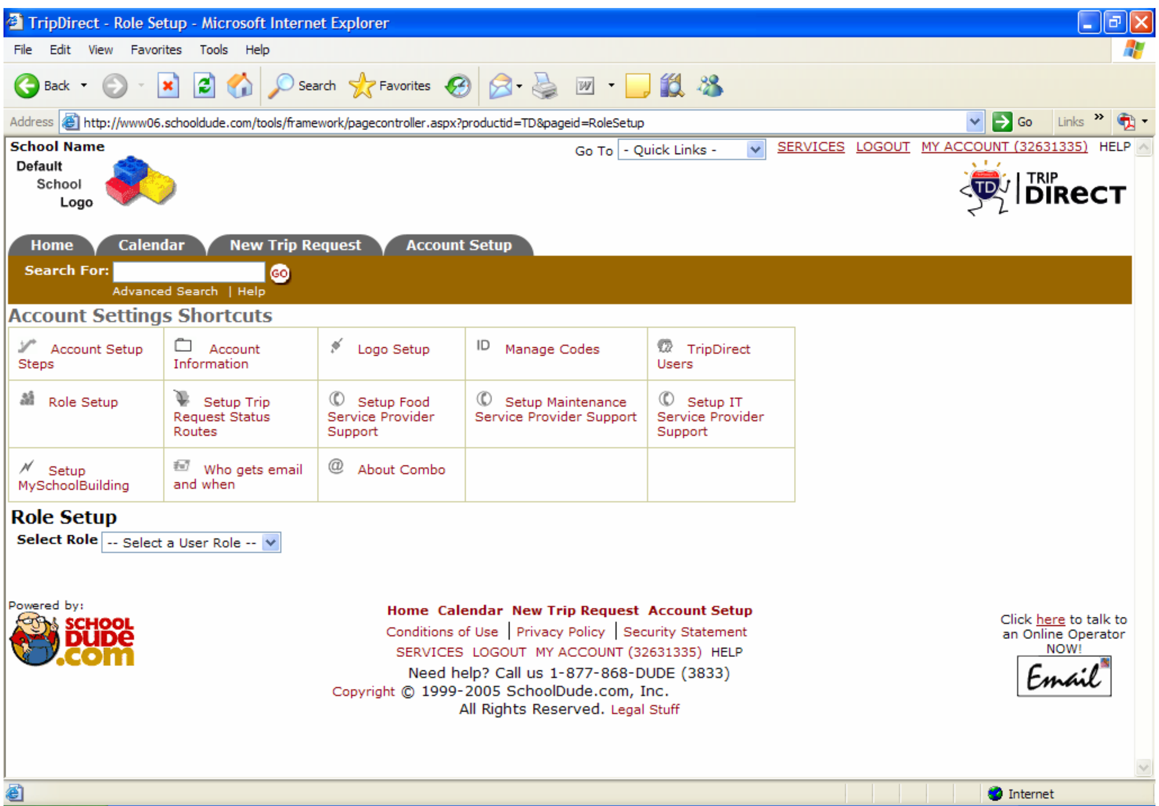
7. ☑ **Role Setup:** You have the ability to choose options for each role you have entered that will determine whether or not the comptroller should be notified when a new user logs in (for the roles of Administrator, Site Administrator 1) and whether or not a user will be allowed to add new organizations (for the roles of Site Administrator 1, Service Provider, and Requester).

To set these options, click on the Role Setup link on the **Account Setup** page and follow the steps below:

- On the **Role Setup** page, select a User Role from the drop-down box.
- A check box will appear next to the available options. To activate the option, click on the check box and a green check will appear.
- Click Save.

The words "Record saved successfully" will appear in red when the screen refreshes.

Click on the Role Setup Shortcut near the top of the page to continue through the rest of the roles.



8. ☑ **Setup Trip Request Status Routes**: At this point, you'll need to decide how your trip requests will be routed. In other words, who will get a request once it is requested, who will they send it on to, etc? As this part of the Account Setup process can sometimes seem a little confusing, we've made this section a bit longer than the others to include more information and explanation to make it as easy to understand as possible.

A trip request can have one of nine statuses:

1) **Submitted**: Think of this as a new trip request. This is the status all trips will have when they are entered by a requester through MySchoolBuilding. It can also be used if entered by any other role to ensure proper routing of new trip requests.

2) **Approved**: Indicates that the request has been approved. It may have only passed through one person and may not have met final approval. The approved status has two statuses that aren't seen by the requester. They are "active" and "inactive". "Active" indicates that the request has met with final approval and has been activated as a trip that will occur. "Inactive" shows trips that are still in the approval process.

3) **Pending**: This status can be used to show trips that are in the approval process or waiting for additional information.

4) **Canceled**: This is used when a trip was active at one time and has since been cancelled. It is always a good idea to include the reason the trip was cancelled in the notes field.

5) **Declined**: The requested trip has been declined by the Administrator or the Site Administrator. We recommend listing a reason in the notes field.

6) **Duplicated**: This request has already been entered. It's always good to include the Trip ID number for the open trip in the notes field. This will tie the two requests together.

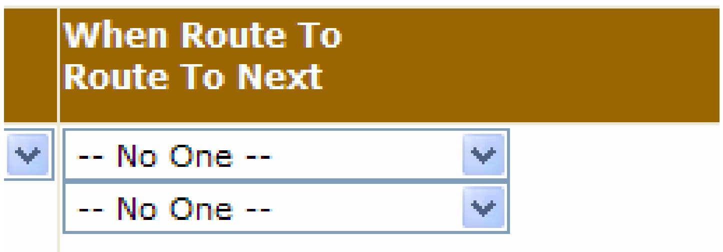
7) **Estimate Requested**: This is used when the requester (or site administrator) would like to get an estimate of what a trip might cost the school. This estimate will then be used to determine if taking the trip will fit into the budget.

8) **Estimate Pending**: Lets the requester know that the request has been received and the estimate is being calculated.

9) **Estimate Complete**: This status indicates the completion of a requested estimate. The requester will be able to view the estimated total by going to "My Requests" in MySchoolBuilding.

SCHOOLDUDE SAYS:

A Word (or Two) About "When Route to Route to Next":



What this means is that when a trip request has been routed, based on its status, to whoever you pick to go in the top drop-down box, it will then be routed next to whoever you pick to go in the bottom drop-down box.

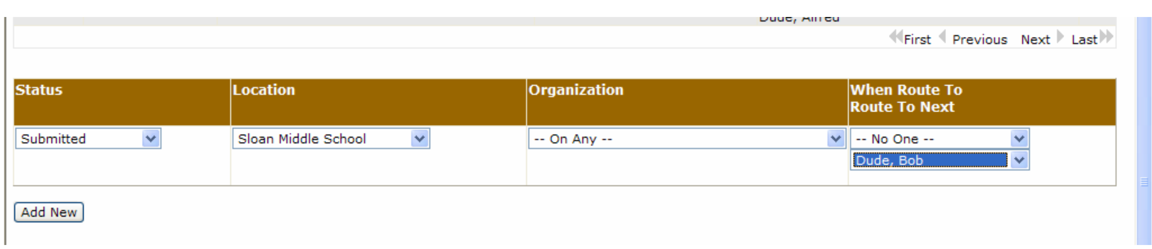
When a requester makes a trip request, its status is "Submitted" and under this status, it will go to the first person designated to approve trips (usually the Principal or another Site Administrator). Therefore, No One would go in the top box and the Principal's name would go in the bottom box. In other words, the request would go first to "No One but the Principal".

If the Principal declined the trip request, the request would immediately be dropped and would proceed no further. If the principal approved the request, however, it would move on in one of two directions: either directly to the Administrator for final approval and activation or it would continue on through a series of approvals before reaching the Administrator for final approval and activation. Only the Administrator can activate a trip request.

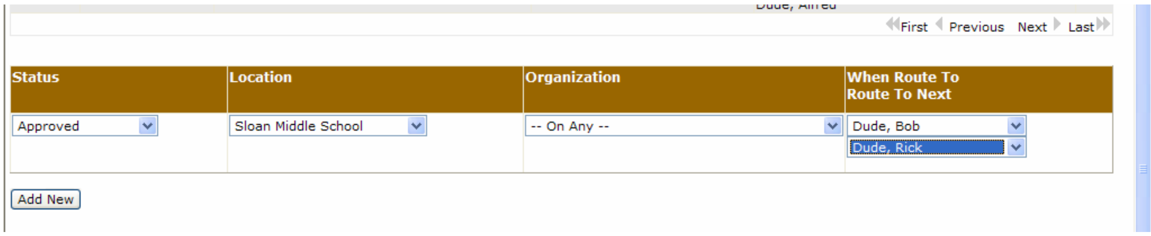
To make a simple example, let's say Andrea (a teacher) is the requester, Bob (the principal) is the Site Administrator 1, and Rick (in the transportation department, resource allocation, etc.) is the Administrator.

Trip requests are routed to go first to Bob for approval and then (once approved) on to Rick for final approval and activation.

Therefore, for the "Submitted" status of the trip request routing process, "No One" would go in the top box and "Bob" would go in the bottom box (the request would first go to "No One" but "Bob").



Second, Andrea's request, if approved by Bob, would go on to Rick. So, once the request reached "Approved" status, Bob would go in the top box and Rick would go in the bottom box (the request would go on from Bob on to Rick).



If the request in this example pertained to any particular organization at Sloan Middle School, then that organization would be chosen from the drop-down box provided instead of "On Any".

You can have as many Administrators and Site Administrators along the way to approve a trip as you need. After a request is routed to the last person for approval, it automatically goes to the appropriate Administrator for activation. Also, keep in mind that a request can only be routed to one person at a time.

Getting Started…

To get started with setting up the trip status routes, click on the Setup Trip Status Routes link on the **Account Setup** page and follow these steps:

- Scroll down near the bottom of the **Setup Trip Request Status Routes** page and click the drop-down box under **Status** to choose the trip status you'd like to start with.
- Next, click on the Location in the drop-down box that this trip request status route will be for.
- Next, choose the Organization in the next drop-down box that this trip request status route will be for.
- Choose your **"When Route to Route to Next"** users by clicking on their names in the drop-down box.
- Click the Add New button.

The words "Record saved successfully" should show in red just above the Trip Request Status Routes list, where you will be able to view the status route you just entered.
Continue following this process until you have entered trip request status routes for all Statuses, Locations, and Organizations.

To **Edit** a trip request status route, simply go to the Setup **Trip Request Status Routes** page and click on the Edit button next to the route that you wish to edit. The route you are changing will be highlighted in orange while underneath, you can change the information in the drop-down boxes. The information to be changed will already be showing in the boxes. Change it by clicking on the drop-down boxes and choosing the Location, Organization, or Users that you wish to enter.

To **Delete** a trip request status route, click on the ⊠ at the right-hand end of the row which contains the trip request status route you wish to delete. To confirm, click OK in the box that will pop up. The Trip Request Status Routes list will show that the entry has been deleted.

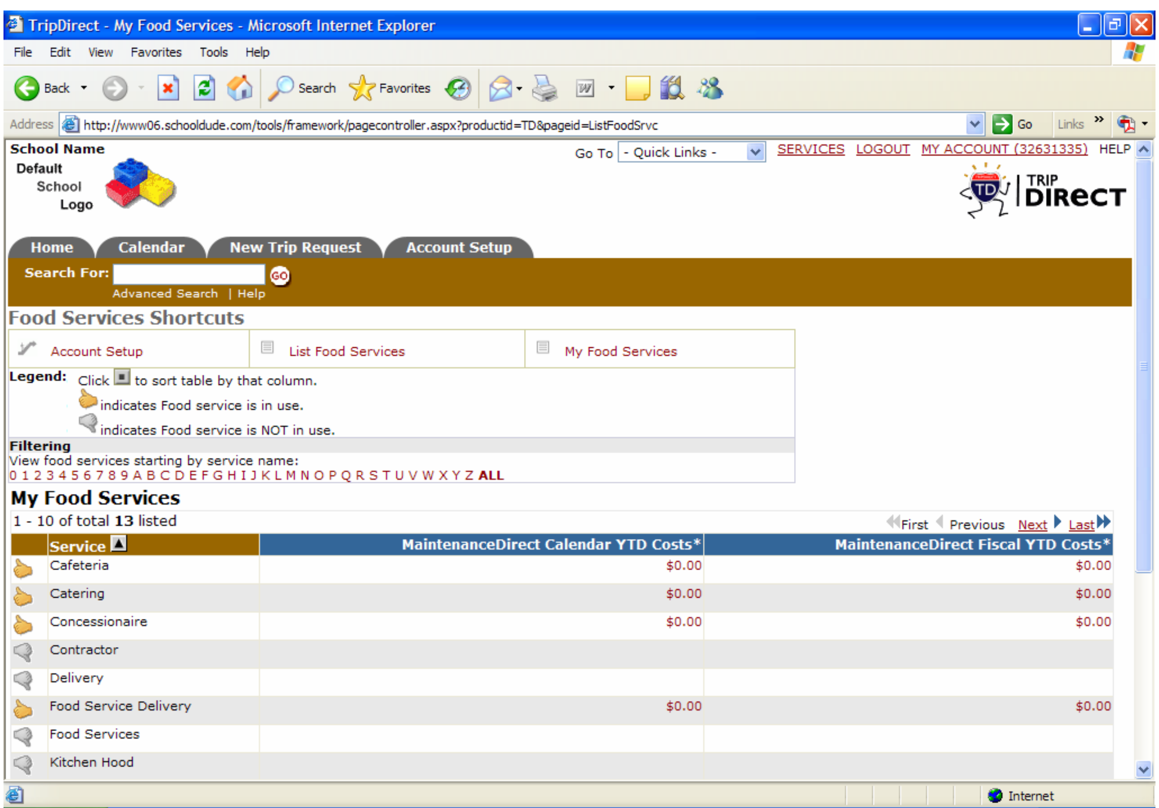
SCHOOLDUDE SAYS: It is very important that you remember to set up all of your trip request status routes *before* trip requests start being attempted. If the route isn't in the system, a requester can still request a trip but that trip request won't show up under anyone's "**Waiting Your Approval**" section. Instead, it will simply show as "**Submitted**" on the **Trips** list and will be easier to overlook. Also, keep in mind that trips that aren't routed will go to the comptroller.

9. **Required Services (IT, Maintenance, and Food Services):** The steps for these three parts of your **Account Setup** will be explained together in this section of the manual for your convenience. They are all activated and used the same way so the only difference is the kind of service you're working with. These three Services are located under the **Budget Codes** section of the **Account Setup** page.
To get started, follow these steps:

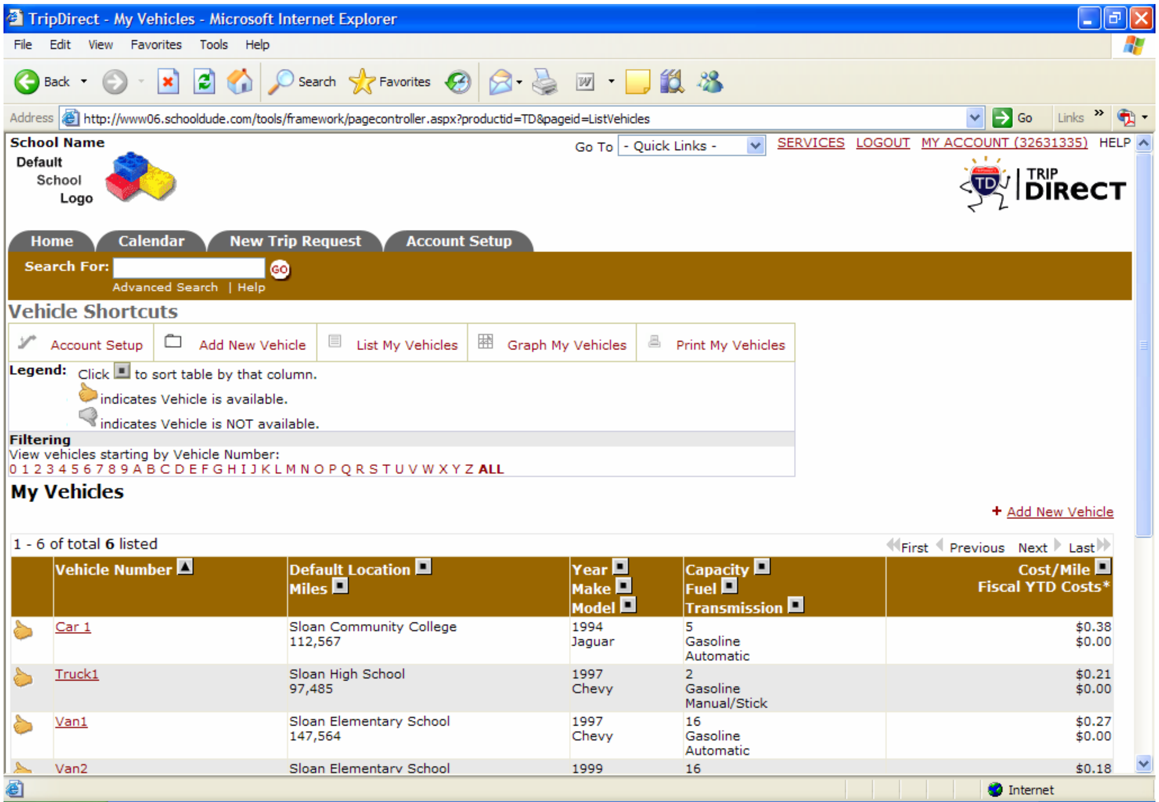
- Click on the Food Services link on the **Account Setup** page.
- As in Transportation Types, when you click on the Food Services link, you will be taken to a page that lists food services options (Cafeteria, Lunch to Go, Restaurant, etc.). Next to each food service type, you will notice a gray thumbs-down icon ( ). To activate the food services you wish to use and make them available for requesters to choose when planning a trip, click on the icon to change it from a gray thumbs-down ( ) to a yellow thumbs-up ( ).

When you finish the first page of ten options, click Next at the bottom of the page to continue on to the remaining food service types.

- Repeat these steps for Maintenance and IT (Information Technology: internet, computers, etc.) Services, activating the options you want to make available for use on a trip, if necessary.



10. Vehicles: Here, you can list all vehicles owned by your educational facility or district and available for trip usage. You can record and store information relevant to each vehicle such as operating cost, capacity, and mileage. Below is a shot of the **My Vehicles** page, with several vehicles entered in as examples:



Click on the Vehicles link from the **Account Setup** page to get started.

- On the **My Vehicles** page, click the Add New Vehicle link.
- Assign the vehicle a number or name and enter it in the **Vehicle Number** field.
  This number or name will be displayed on all Trip forms.
- Move on to enter optional vehicle information including whether it is in service or out of service, the location of the vehicle, make, model, year, capacity, fuel type, transmission type, and cost per mile. This information will show alongside the vehicle number on the My Vehicles page and will make vehicle selection easier.
- Under Step 2, the **History** section, you can enter vehicle mileage and any notes you wish to include about the vehicle itself.

- Click Save.

The words Record saved successfully will appear in red near the top, underneath **Add/Update Vehicle** when the page refreshes.

Repeat the process using the Add New Vehicles shortcut at the top of the page to continue adding vehicles.

11. Drivers: This is where you can store any drivers your educational facility will be using so that they may be assigned to drive for a trip. Drivers could be anyone hired by the school expressly as a driver, any outside person hired by the educational facility for this purpose, or a temp driver.
Use this section to keep up with your driver's information and to log the trips they've taken.

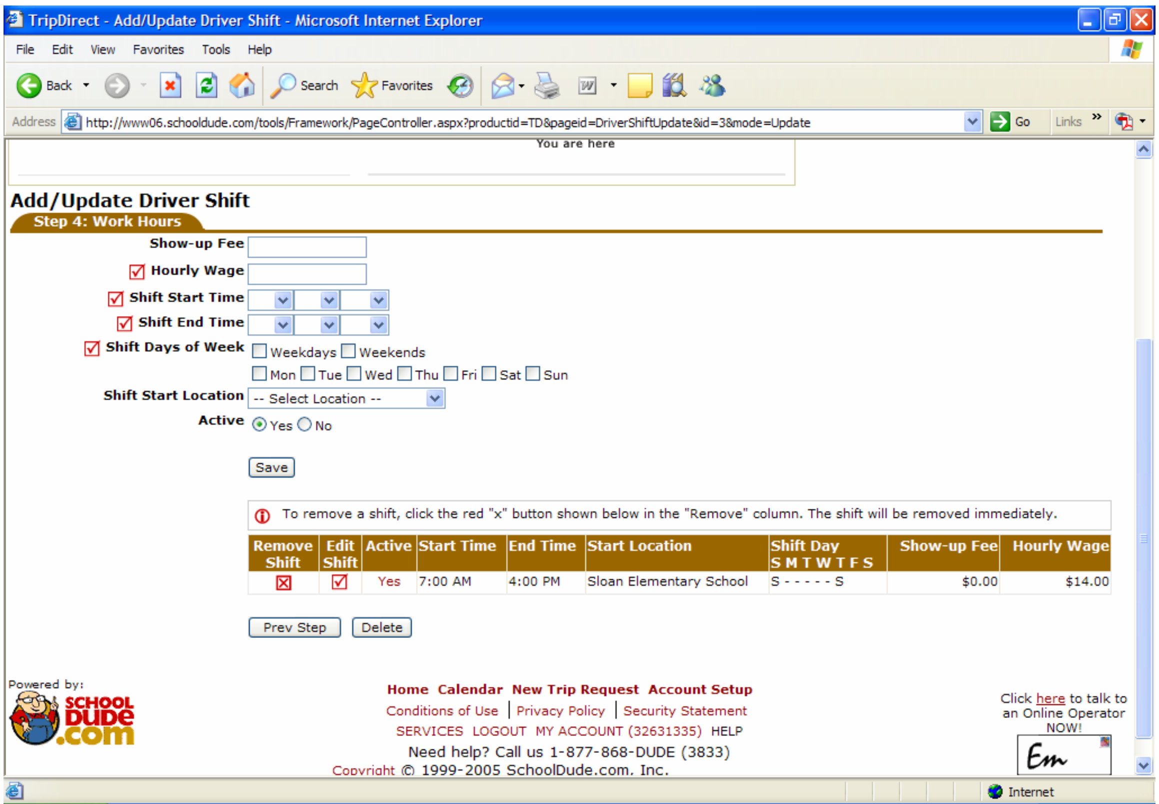
Click on the Drivers link on the **Account Setup** page to get started.

- On the **My Drivers** page, click the Add New Driver link.
- Step 1: Enter the required information: the driver's First Name, Last Name, and Date Hired.
  Years Employed will automatically fill in for you after you enter the Date Hired. This date can be changed to show the driver's years of experience, rather than the amount of time they have worked with your educational facility.
- Next, you can enter their **Work Phone**, **Email Address**, whether they are **Active** (click Yes or No), and their **Miles Logged**. **Miles Logged** will update automatically with every trip driven.
- Step 2: Select Vehicle Number and Default Location from the drop-down boxes provided.
- Step 3: Enter any notes you wish to include on the driver.
- Click Next Step.
- Step 4: If this driver has a show-up fee, enter it here at the top of the page. This field can also be used if the driver is paid a flat rate.
- Fill in the required (☑) information fields (hourly wage, shift start and end times, and shift days of the week).
- Select a shift start location from the drop-down box provided.
- Choose whether or not this driver is active by clicking Yes or No.
- Click Save.

The driver's shifts, once entered, will appear listed at the bottom of the page. Shift time can't exceed 12:00 midnight, as this is the next day.

To remove a shift at any time, simply go to the **My Drivers** list, click on the Driver's name whose shift you wish to delete, scroll to the bottom of the **Add/Update Driver** page, and click on Next Step. On the **Add/Update Driver Shift** page, scroll to the shift list at the bottom and click the ☒ next to the shift that you wish to delete.

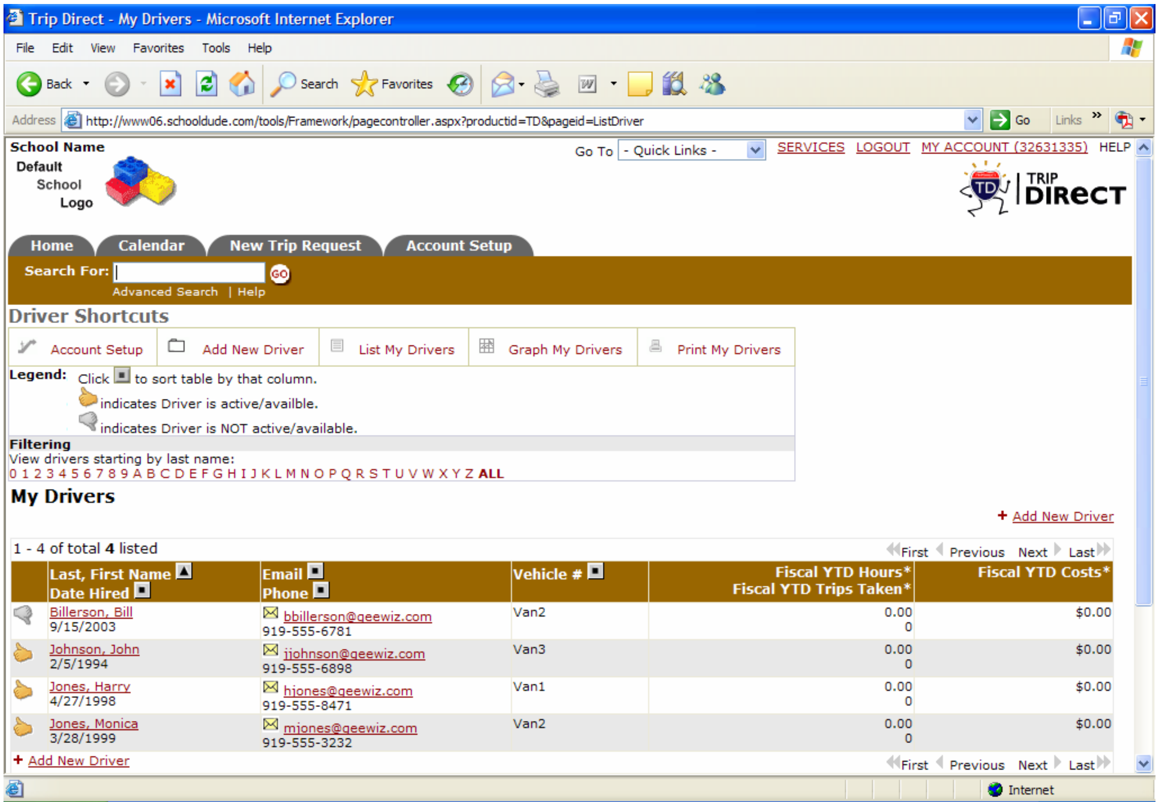
To edit a shift, click the ☑ next to the shift you wish to edit, make the desired changes, and click Save.



SCHOOLDUDE SAYS: Shifts will be used when making Driver assignments so it would be a good idea to make sure you leave a little "flexibility" room when creating shifts in case a driver needs a few hours more or less on a shift.

To remove a driver, go to the **My Drivers** page and click on the name of the Driver you wish to delete. Scroll to the bottom of the **Add/Edit Driver** page and click the Delete button. To confirm, click OK in the box that will pop up. You will immediately be taken back to the **My Drivers** list, which will show that the driver has been deleted.

If you would like to email one of the drivers you have entered, go the **My Drivers** page and click on their email address, next to the little yellow envelope. A blank email form will pop up, ready to use.



12. Vendors: You can enter the information of any vendors used by your educational facility here. A few examples of vendors are outside transportation companies like charter bus companies and any outside food services.

To get started, click the Vendors link from the **Account Setup** page.

- On the **My Vendors** page, click the Add New Vendor link.
- Step 1: Next to Vendor Name, enter the vendor's company name.
- Proceed with required information, including First and Last Name of vendor contact and their address.
- Enter any further information, including phone number, email address, and any notes you wish to make.
- Step 2: How would you like for this vendor to be paid? Enter billing and payment information here, including **Contract** number, **Federal ID** number, **Credit Limit**, **Surcharge**, and whether or not this vendor is active at this time (click Yes or No).
- Click Save.

The words Record saved successfully should appear in red near the top of the page once it refreshes.

To delete a vendor at any time, simply click the Delete button at the bottom of this page. Or from the **Account Setup** page, click the Vendors link, click the Vendor's name on the **My Vendors** page, scroll to the bottom of the **Add/Update Vendor** page, and click Delete.

To edit vendor information at any time, click on the Vendor's name on the **My Vendors** page and change the information you wish to edit. Click Save at the bottom when you're finished.

To view notes made on a vendor, click on the Vendor name from the **My Vendors** page.

13. Budgets: To keep track of budgeting and trip-related costs, enter your budget information here. You can have a different budget for each organization or for each trip. Organize your budgets in the way that works best for you.

To get started, click the Budgets link on the **Account Setup** page.

- On the My Budgets page, click the Add New Budget Code link.
- Under Add/Update Budget Code, enter a code for the budget.
- In the Description field, give the budget a self-explanatory name or give a brief description of what the budget is for.
- Enter any Fiscal Year Budget Monies and any notes you wish to include.
- Click Save.

SCHOOLDUDE SAYS: Keep in mind that the Budget window will display the budget's code and description. You will have room for about 30 characters.

When the page refreshes, you should see the following changes:

1. The words Record saved successfully in red near the top of the screen.
2. Also, a **Budget vs. Expenses** bar graph will appear on the right-hand side of the screen, showing budgeted monies and expenses to date (fiscal).
3. **Fiscal year Budget Monies** will show at this time as well as
4. **Budget Amount Remaining**.
5. There is also a box that can be checked or unchecked to indicate whether or not this particular budget is currently being used in TripDirect.

To delete or update a Budget at any time, click on the Budget name on the **My Budget Codes** page. Once on the **Add/Update Budget** page, you can either edit the budget information, clicking Save when you're finished, or you can scroll down to the bottom and click Delete to take the budget off of your list.

SCHOOLDUDE SAYS: Budgets with costs used can NOT be deleted unless costs are reassigned.
Also, $ amount changes update each night at midnight.

14. Trip Packages: Now the fun part! This is where you get to create trip packages for trips that are taken by those at your educational facility on a regular basis (each semester, each year, etc.). Once created, these trips are stored in TripDirect so that whenever the time for the trip approaches, requesters can select the trip package and most of the information is already filled in for them.

- Click the Add New Trip Packages link on the **My Trip Packages** page.
- Step 1: Enter the title of the trip package in the Package Name field. The name should be one that makes it easily identifiable to requesters.
- Enter any available information on the trip destination into the remaining fields (address, city, state, zip, phone, email, web site).
- Step 2: Describe the trip's educational objective in the box provided. Enter minimum and maximum ages of students attending.
- Step 3: Enter any site/destination details that you have, including entry fees, days and hours of operation, tour duration, etc.
- Click Save at the bottom of the page when you're finished filling in the information that you have.

SCHOOLDUDE SAYS: Also under Step 3, you have the two very helpful options of including both the website url of the trip location you are visiting as well as the driving directions explaining how to get there. Having the website address available will make it so much easier to look up details on the trip site (hours of operation, features, tour info, etc.) while driving directions would be great for any additional teachers, faculty, or parents who might be coming along for the trip on a separate vehicle or leaving at a later time to join the trip party at the destination.

After clicking Save, the page will refresh and the words Record saved successfully will appear in red at the top of the screen.

To continue adding trip packages, simply click on the Add New Trip Package link under **Trip Package Shortcuts** at the top of the page.

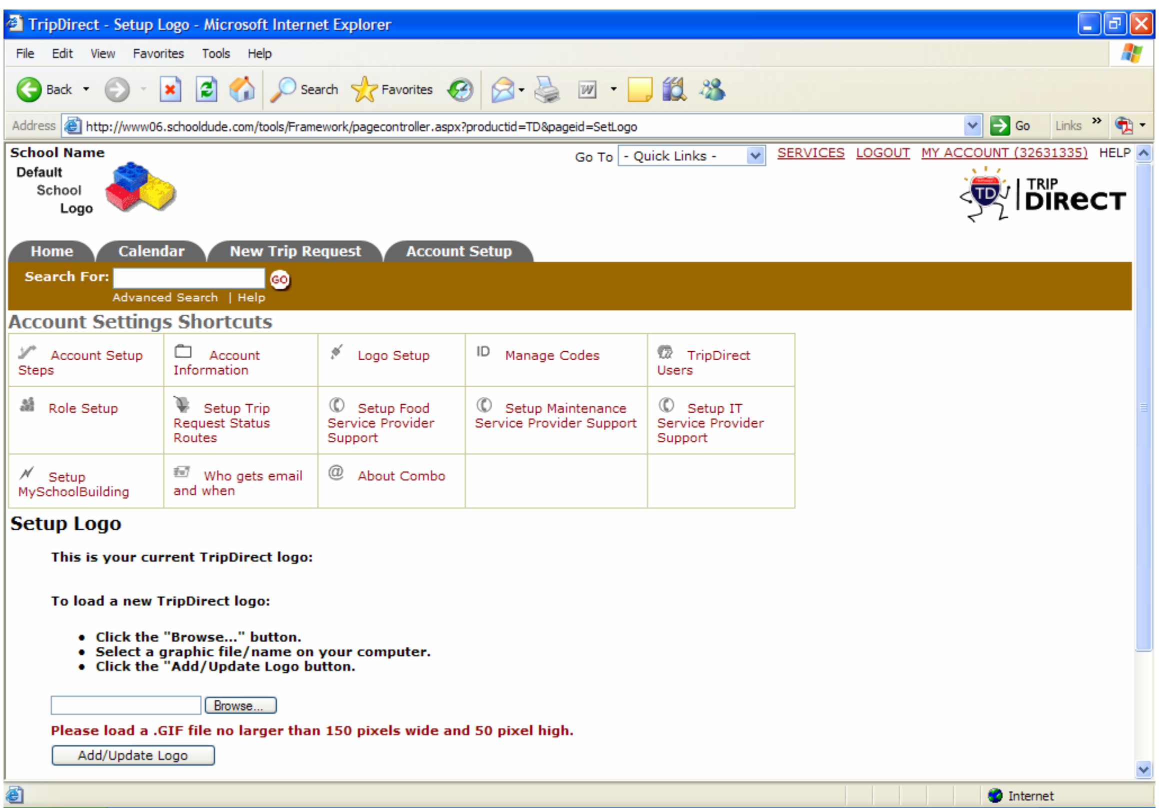
To delete a trip package at any time, go to the **Add/Update Trip Package** page by clicking on the trip package on the **My Trip Packages** page, scroll to the bottom of the page, and click the Delete button. To confirm, click OK in the box that will pop up. You will immediately be taken back to the **My Trip Packages** page which will show that the trip package has been deleted.

15. **Logo Setup:** To add your educational facility's logo or mascot to the top left-hand corner of your SchoolDude page, click on the Account Setup tab at the top of the page and then click on the Logo Setup link or the shortcut link at the top of the page.

SCHOOLDUDE SAYS: Your logo must be in the GIF format (it must have a .gif file extension) and must have a maximum width of 150 pixels and a maximum height of 50 pixels.

Perform the following steps:

- Click the Browse button near the bottom of the page.
- Locate the file containing your school's logo or mascot by clicking on its name in the drop-down box at the top of the page.
- Click the Open button to load the picture.
- Click the Add/Update Logo button to add your logo to the top of the page.



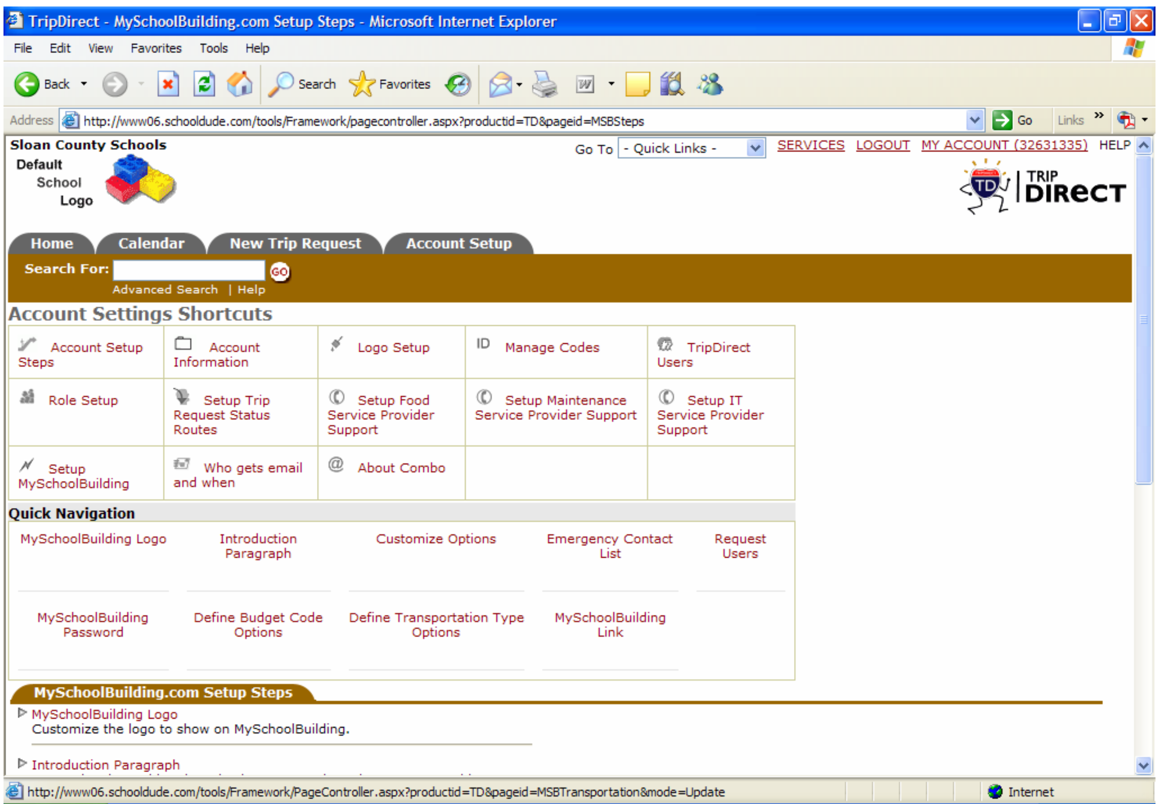
The same steps can be followed to update your logo at any time.

SCHOOLDUDE SAYS: If your educational facility's logo is square (for example, 50 x 50), it might be a good idea to go in to the logo and add white space to fill the dimensions of 50 x 150. That way, the logo won't show up stretched and distorted to fit those dimensions.

16. MySchoolBuilding Setup Steps: This is where you set up the information and options for your educational facility on MySchoolBuilding.com, the page where Requesters go to make trip requests. This page is available to all TripDirect roles, but Requesters will go directly here to log in.

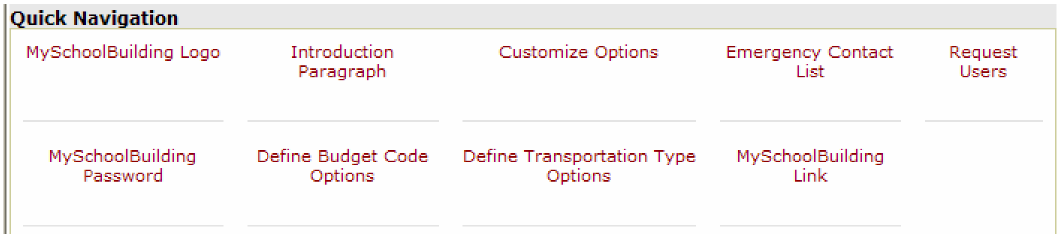
To get started, click on the MySchoolBuilding Setup Steps link at the bottom of the **Account Setup** page, or choose the Setup MySchoolBuilding Shortcut at the top of the **Account Setup** page. Follow these steps:

Once you click on the appropriate link, you will be taken to the MySchoolBuilding.com Setup Steps page, which looks something like this:

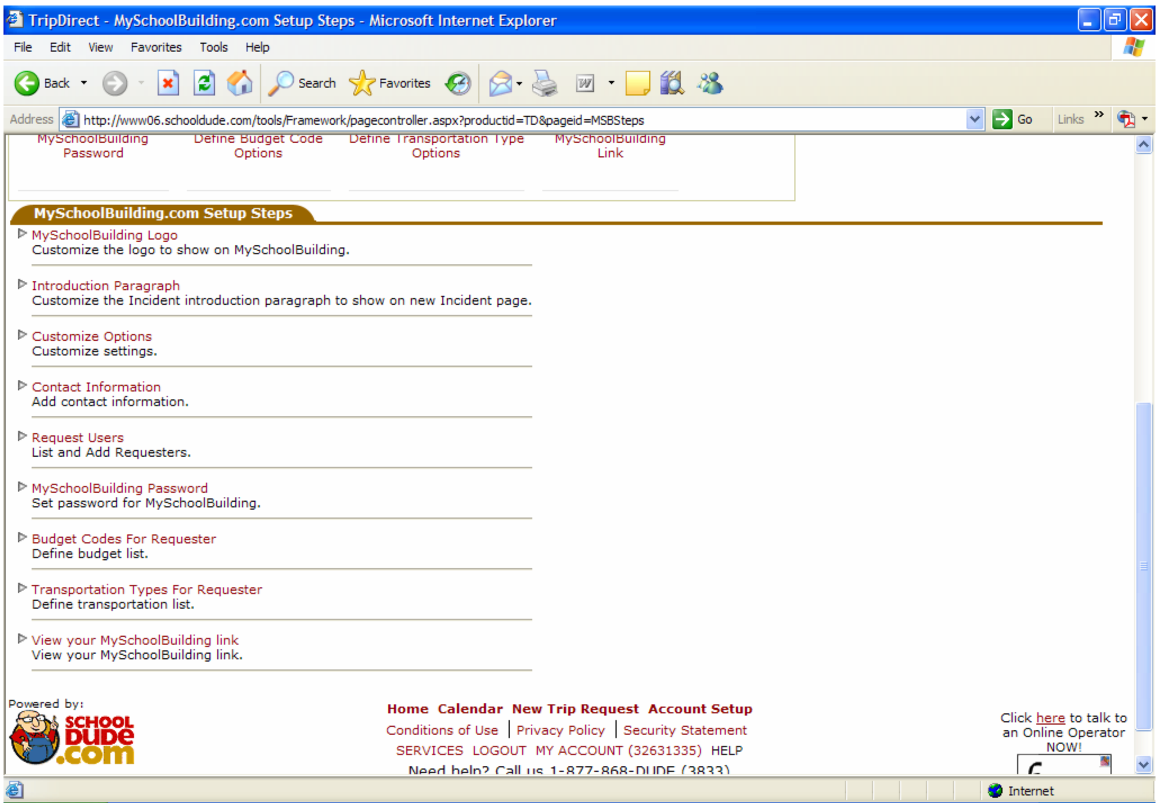


Near the top of the page, you'll see all the Shortcuts that were accessible from the **Account Setup** page.

Beneath those, however, you will see the **Quick Navigation** links, which also serve as shortcuts for this particular page, allowing you to click on whichever of the MySchoolBuilding.com setup steps you'd like to start with first. They look like this:

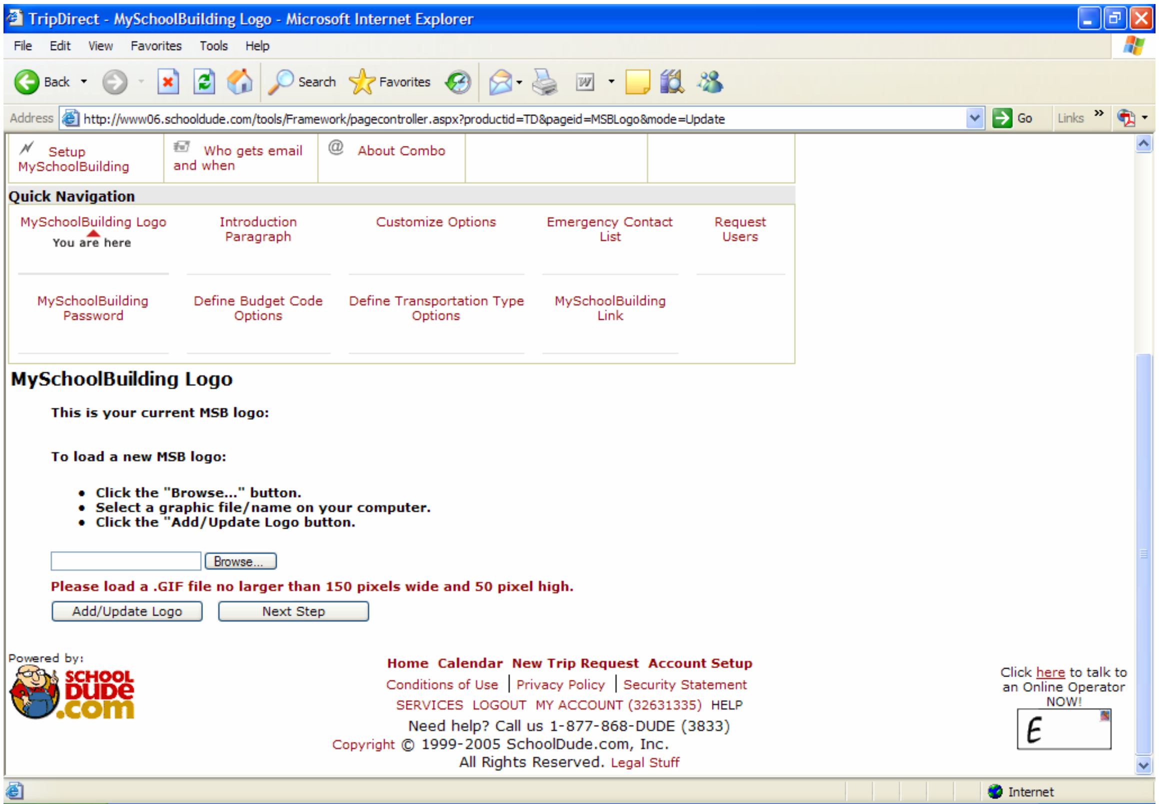


Further still down the page, below the Quick Navigation links, is a list of each of the MySchoolBuilding.com setup steps. See below:

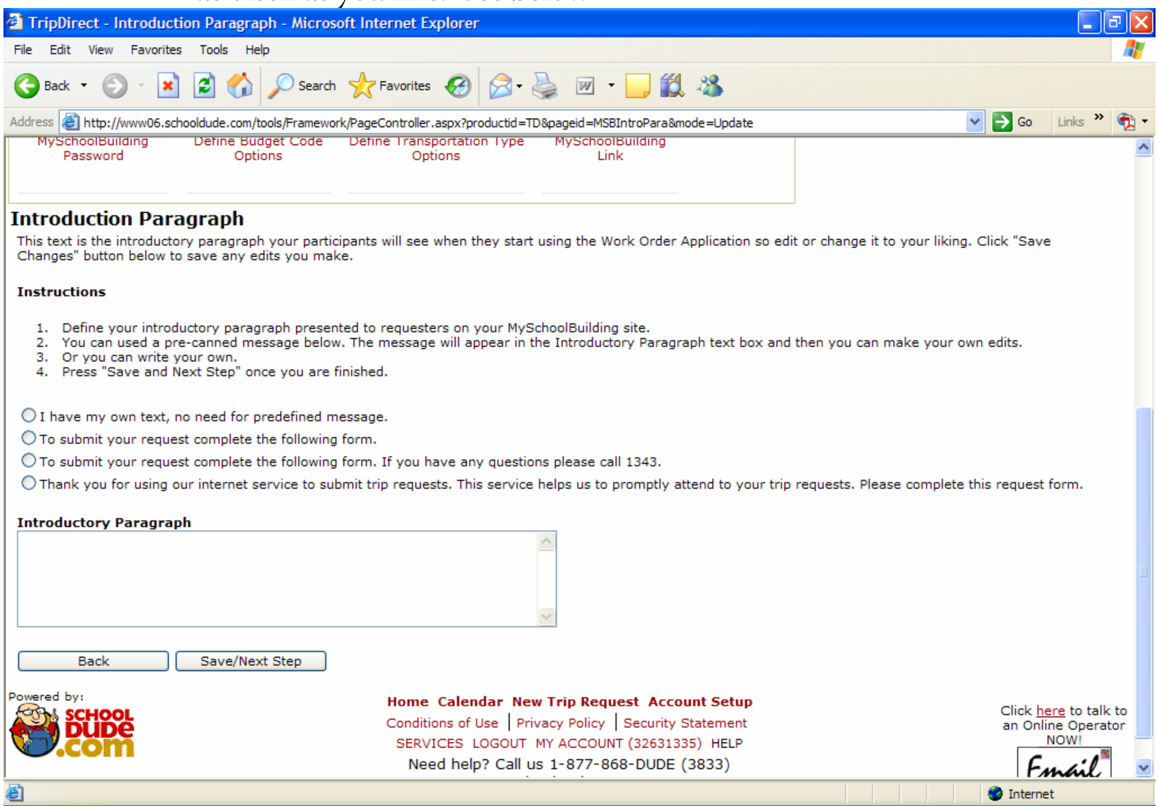


You can use this list of the steps as a guide to set up your MySchoolBuilding.com page, following them in order. To set up your MySchoolBuilding.com in this order, the steps are as follows:

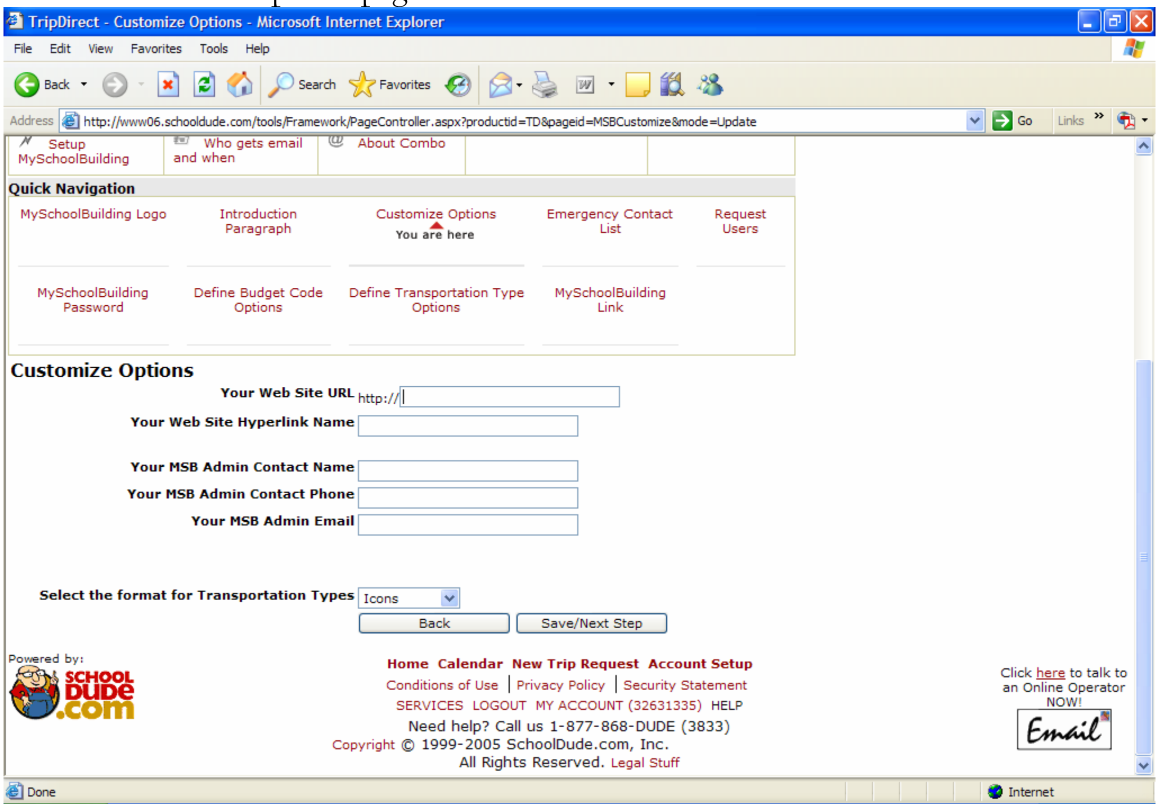
a) MySchoolBuilding Logo: Click on this link and follow the instructions that come up on the page, keeping in mind that your logo must be a .GIF file no larger than 150 pixels wide and 50 pixels high. See below:



b) Introduction Paragraph: For this step, you will need to, after clicking on the link, follow the instructions and write an introductory paragraph that Users will see upon logging in to MySchoolBuilding.com. You can edit it as often as you like. See below:



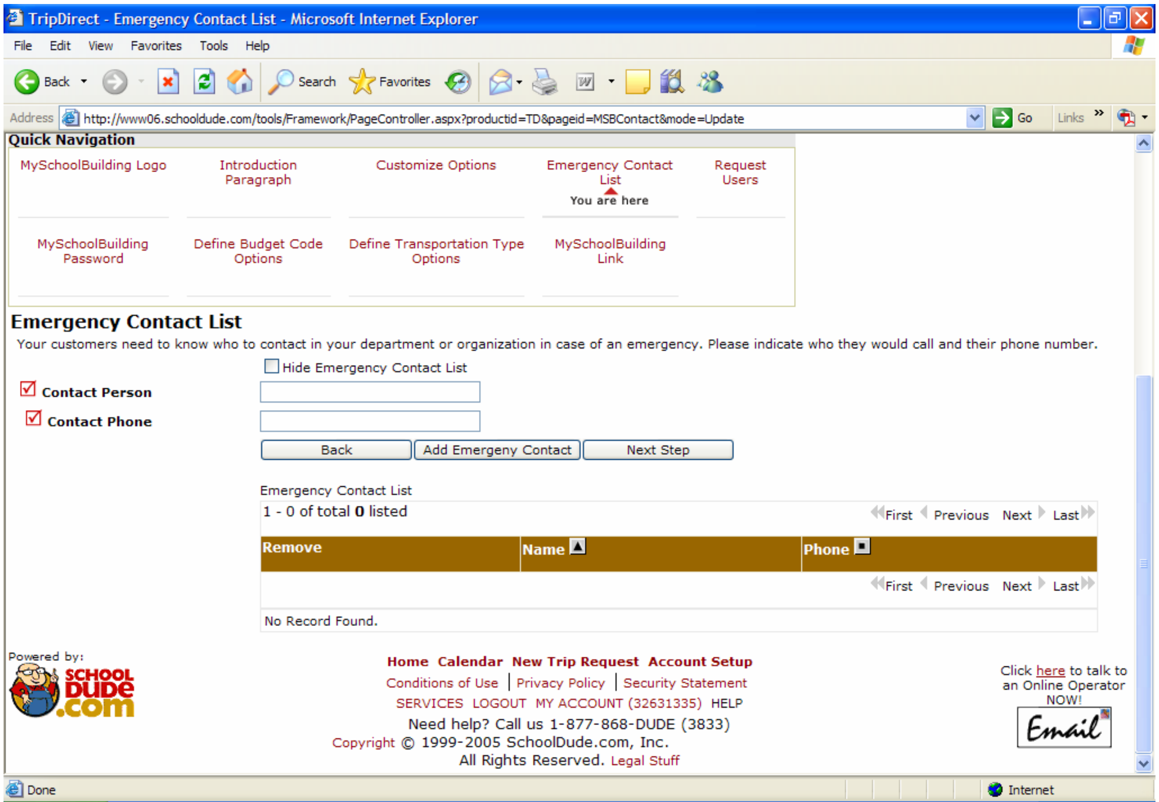
c) After you choose or write what text you would like to appear as the introductory paragraph and click Save/Next Step, you will be taken to the Customize Options page below:



On this page, you can:

- Enter your website URL or address, website hyperlink name, and the contact information of your MySchoolBuilding Administrator.
- Select the format you wish to use for Transportation Types (Icons or Combo List).
- Click Save/Next Step.

d) This will take you to the Emergency Contact page, which looks like this:

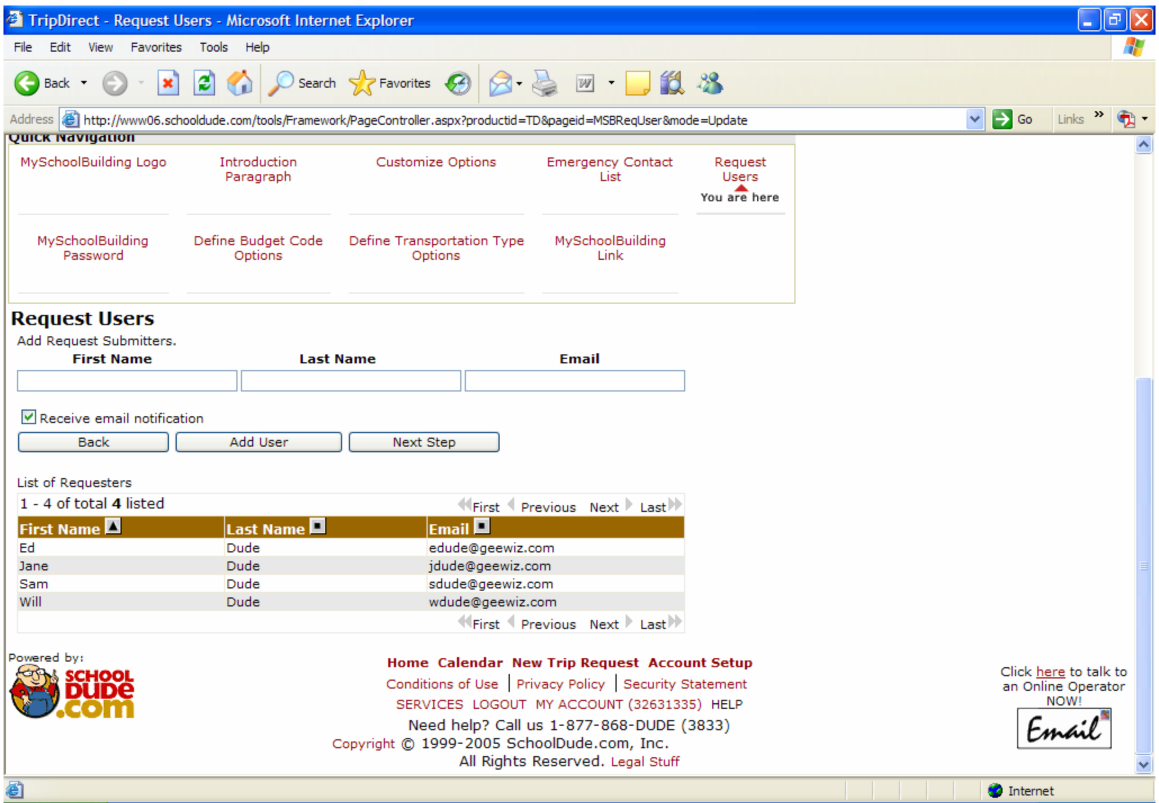


On this page, do the following:

- Choose whether or not to hide your emergency contact list, clicking the check-box provided if you wish to hide it.
- Enter the name of your first Emergency Contact.
- Enter that Contact's phone number.
- Click Add Emergency Contact.
- Repeat these steps until all of your Emergency Contacts have been added.
- Click Next Step.

e) The next page to come up will be the Request Users page. This is where you will add the names and email addresses of those within your district or at your educational facility that will be able to request trips at MySchoolBuilding.com. In other words, who will be the Requesters?

Below is a view of the Request Users page with several Requesters already added. All Users that you have previously added during the Account Setup process will appear here, already listed.

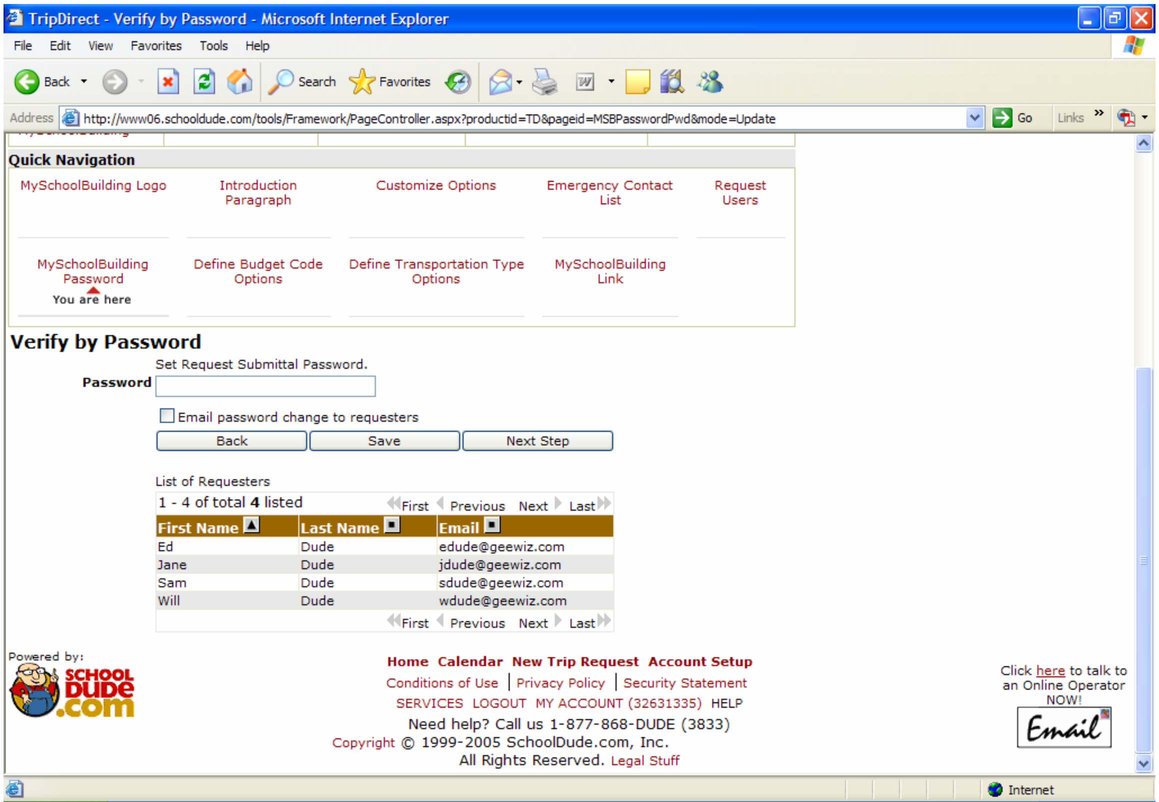


If you have no other Users to add, click Next Step and proceed on to the next section.

To add Requesters, follow these steps:

- Enter the Requester's First Name.
- Enter the Requester's Last Name.
- Enter the Requester's Email address.
- Choose whether or not the Requester will receive email notifications by clicking the green check in or out of the check-box provided.
- Click Add User.
- Once all your Requesters have been added, click Next Step.

f) Next, you will be taken to the page headed Verify by Password. This is where you will set a standard password for all of your Requesters that they can change once they log into MySchoolBuilding.com for the first time. The page will look something like this:



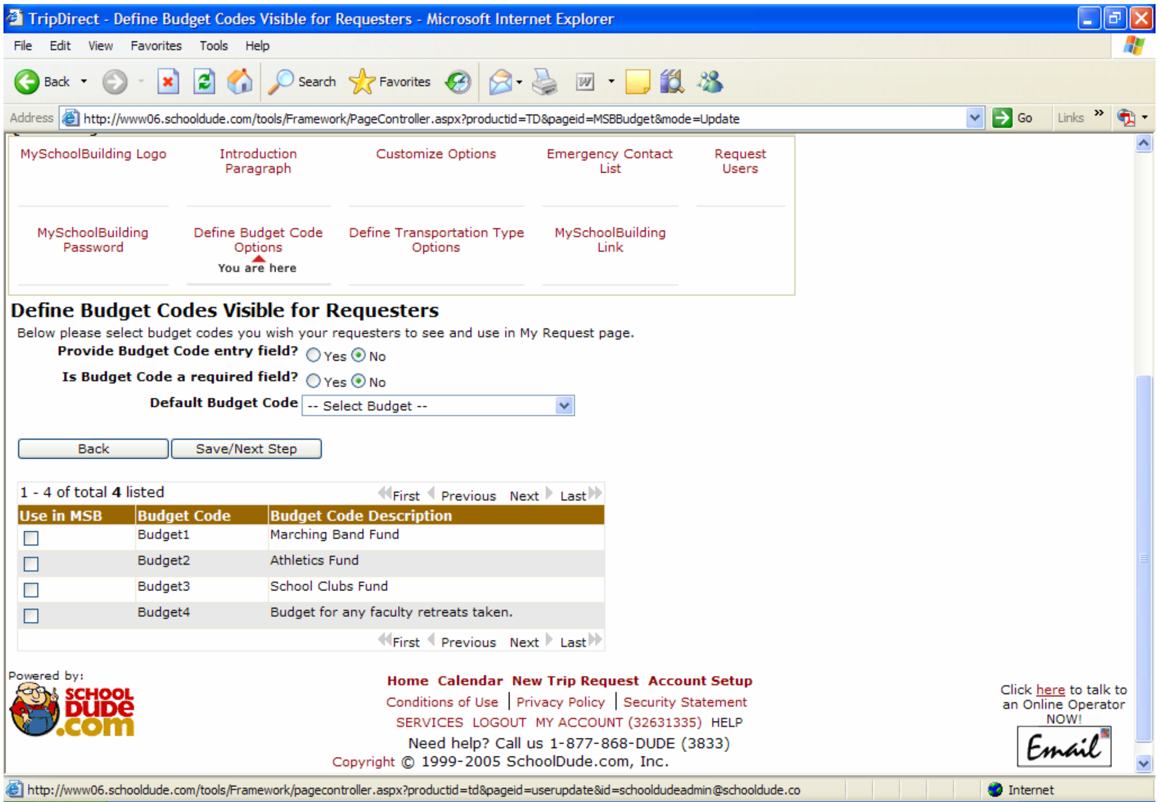
Once you have decided on a password that will be easy for your Requesters to remember follow these steps:

- Enter the password into the space provided.
- Click the green check in or out of the check-box provided to indicate whether or not you would like for the password change to be emailed to the Requesters.
- Click Save.

Once you have clicked Save, the page will refresh and the words "Record Saved Successfully" will appear in red above the password field. Your password has been saved.

- Continue by clicking Next Step.

g) Define Budget Codes Visible For Requesters: As the page heading states, this is where you will decide which of your Budget Codes that your Requesters will be able to see, if any. When the page opens, it will look something like this:



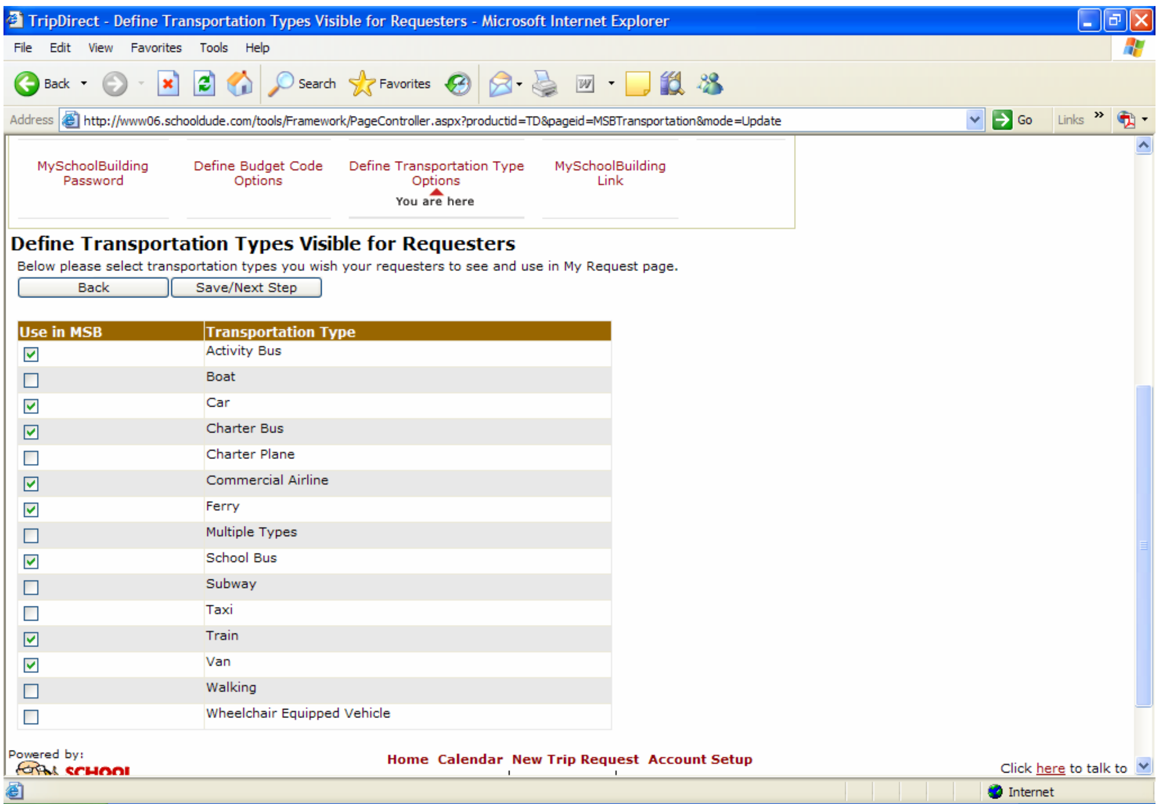
As you can see, once you enter Budget Codes during the Account Setup process, those Budget Codes will appear listed here (see example above). Continue with the steps below:

- Decide (by clicking Yes or No) whether or not the Budget Code entry field will be provided on the MySchoolBuilding.com page.
- Decide (by clicking Yes or No) whether or not the Budget Code is a required field on the MySchoolBuilding.com page.
- Select a Default Budget Code from the drop-down box provided
- Choose which of your listed Budget Codes will be available for use on your MySchoolBuilding.com page by clicking on the check-box next to the Budget Code you wish to make available.
- Click Save/Next Step.

h) Define Transportation Types Visible for Requesters: This page displays a list of all available Transportation Types. The Transportation Types you chose to make available to Requesters during the Transportation Types step of Account Setup will have a green check in the check-box next to them.

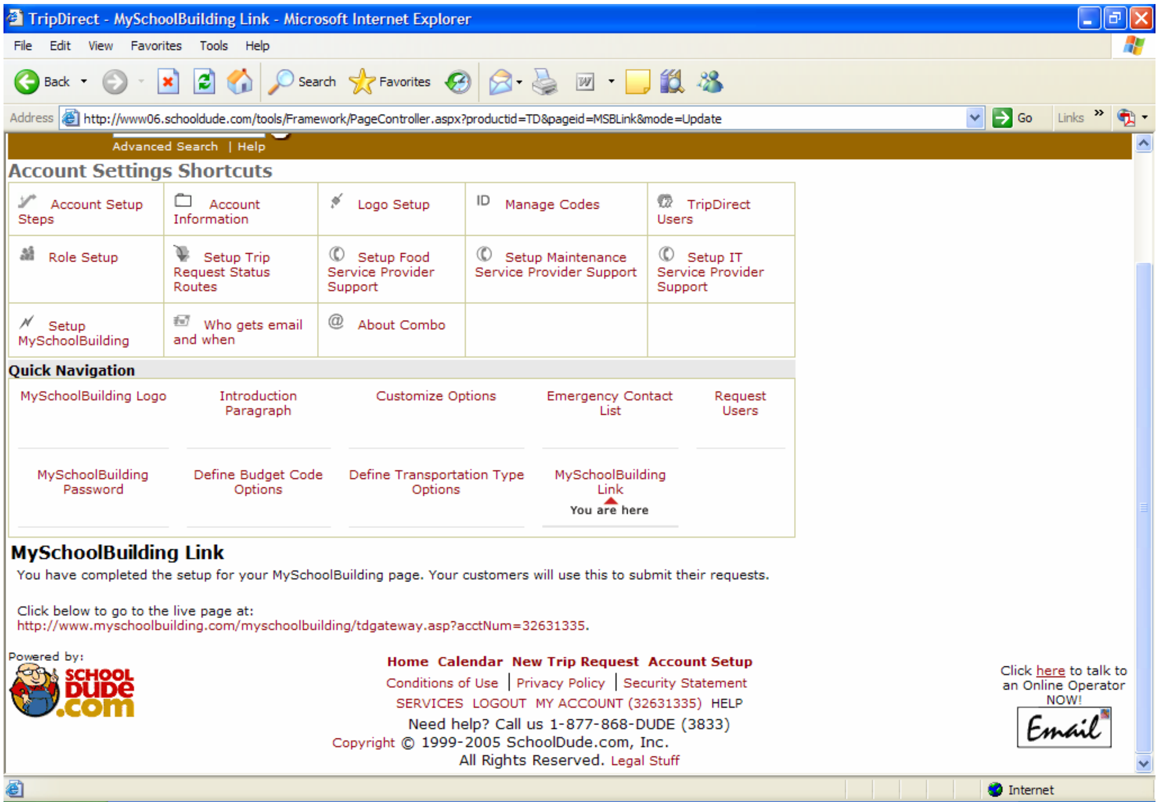
- If you would like to make any changes to the Transportation Types you would like to have visible/available for Requesters on the MySchoolBuilding.com page, check or un-check the boxes accordingly.

Below is a shot of this page with several Transportation Types already checked:



- When you're finished making any changes (or not), move on the the next step by clicking Save/Next Step.

i) MySchoolBuilding Link: This page wraps up your setup of your MySchoolBuilding page. It will look something like this:

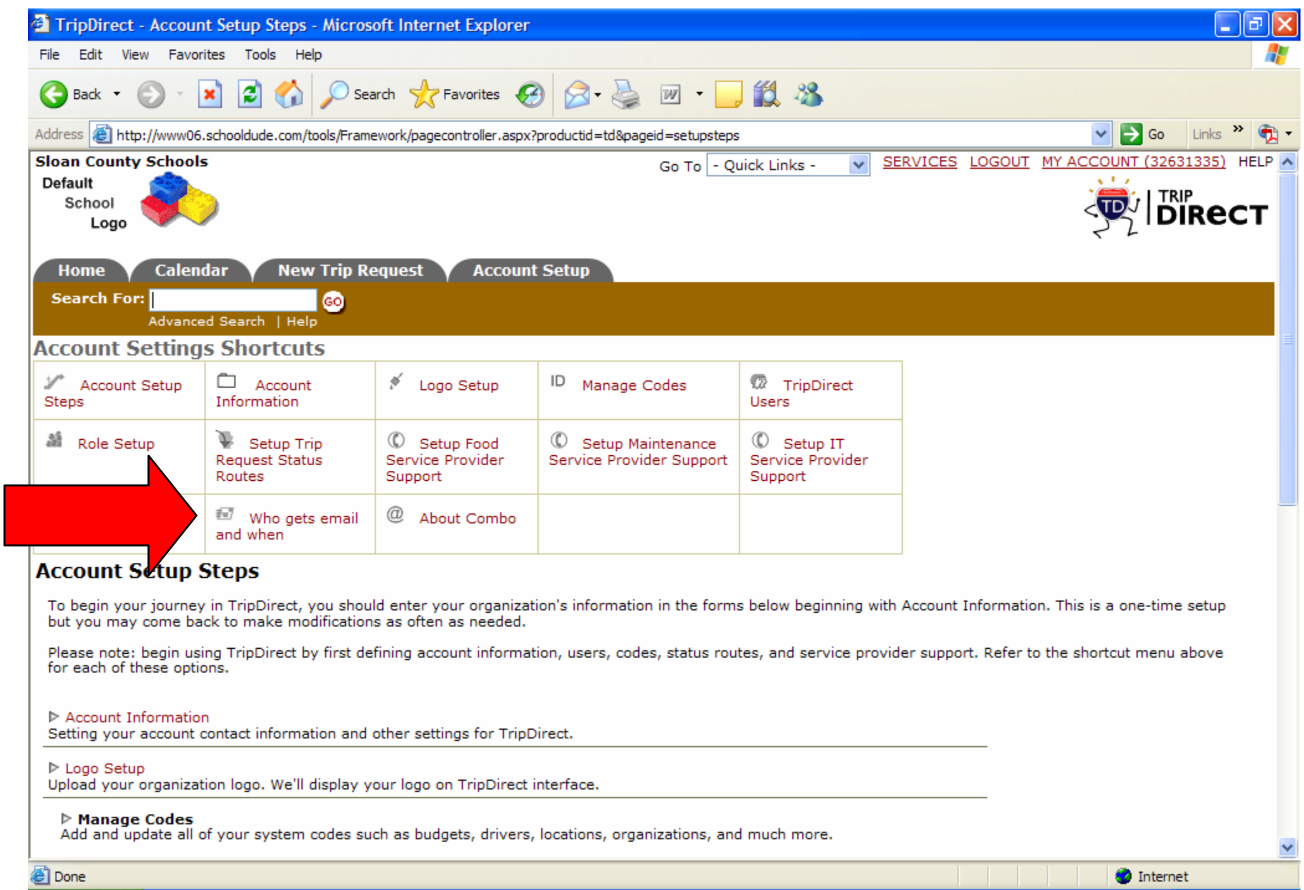


A link is provided in red at the bottom of the page that will allow you to go directly to the live MySchoolBuilding.com page. You're done!

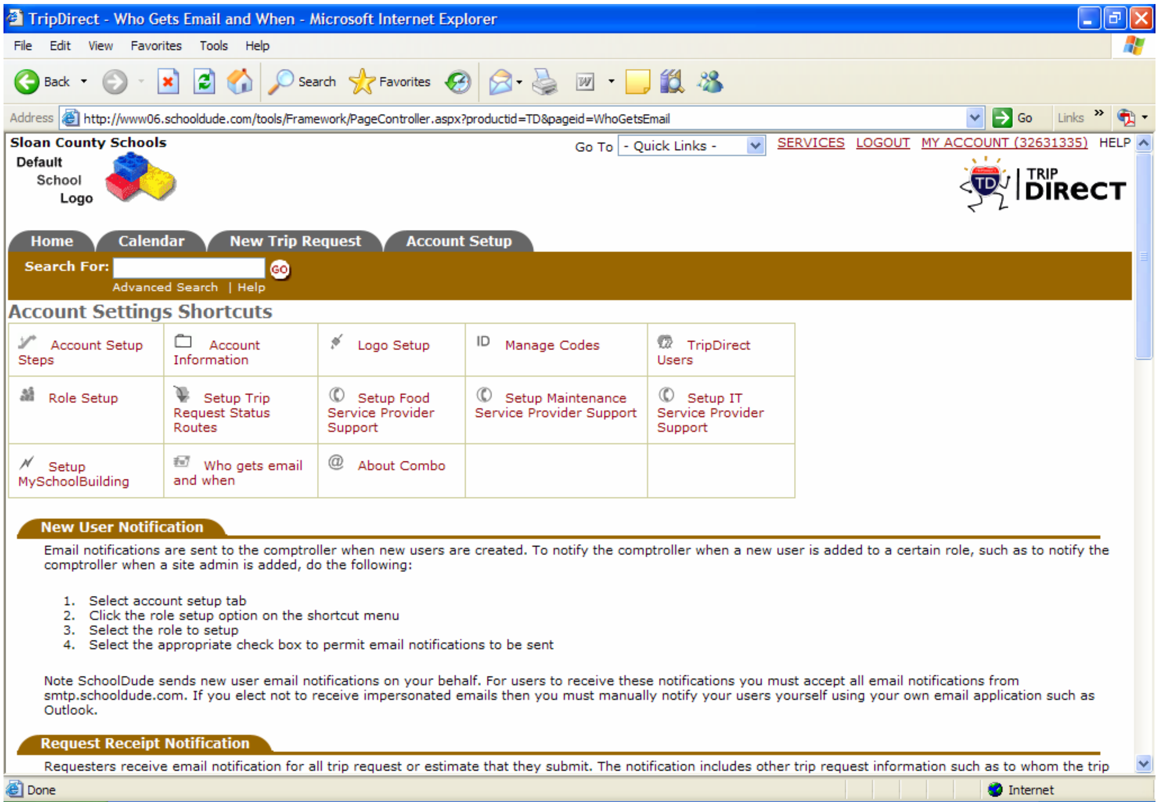
17. Who Gets Email and When

There are two shortcuts remaining under Account Setup. The first of these is Who Gets Email And When, a page where you can read up on all there is to know about how emails are routed (when, why, and to whom) in TripDirect. This section walks you through all scenarios in TripDirect in which email is used so that you can decide how to set it up to work best for you. The page itself is fully instructional so we'll leave the directions out of this manual and refer you instead directly to this page where you can find all the answers you need.

- To reach this page, simply click the Who Gets Email and When shortcut at the top of the **Account Setup** page, shown below:



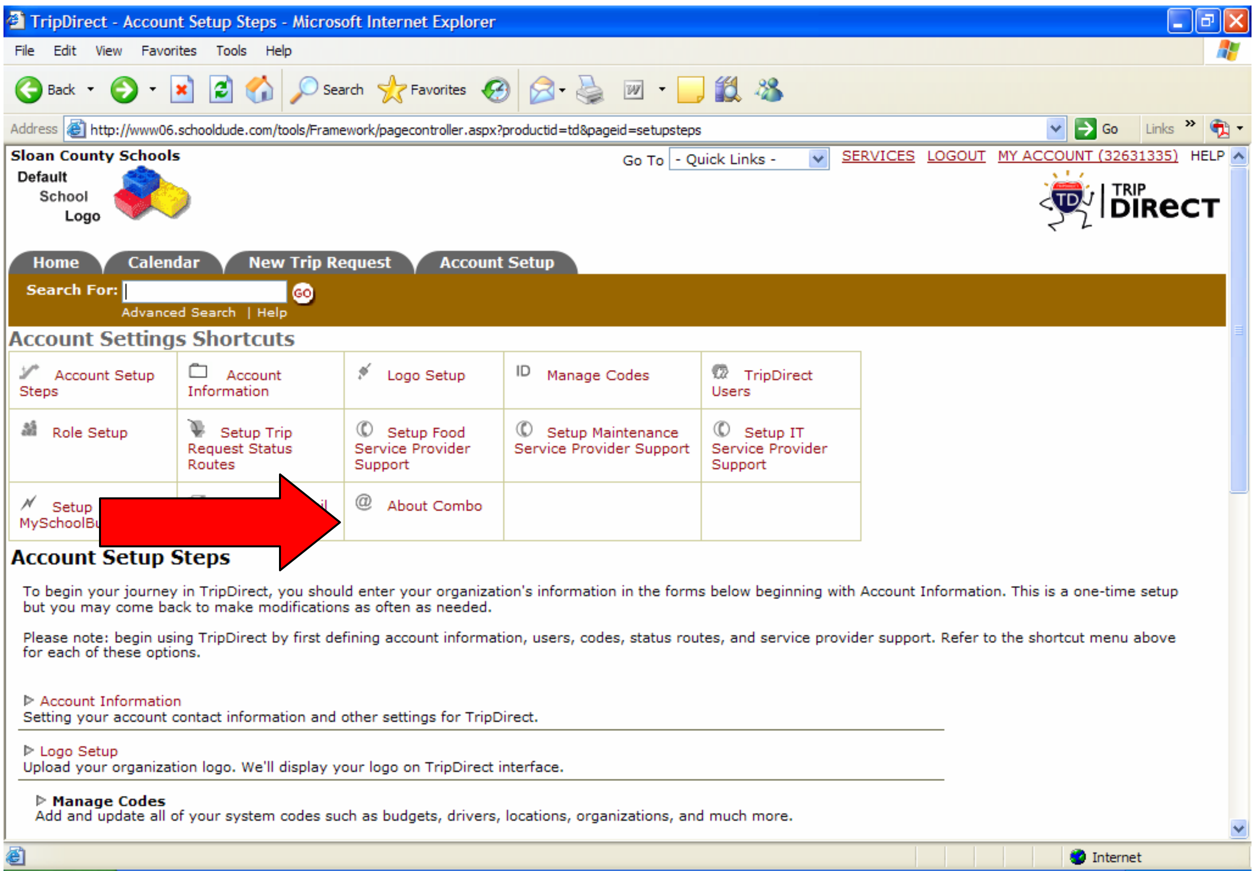
The **Who Gets Email and When** page itself will look like this:



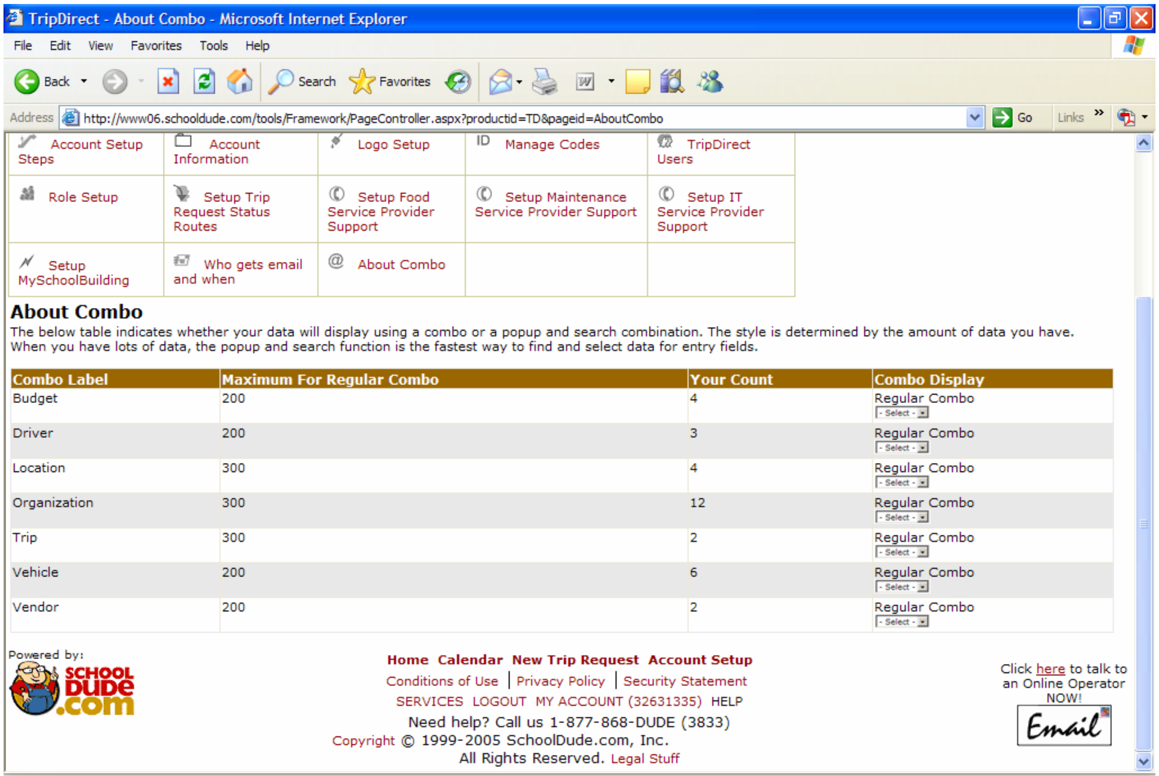
All instructions can be read by scrolling down the full length of the page.

18. About Combo

You've reached the last Shortcut on the **Account Setup** page! The **About Combo** page can be reached by clicking on the About Combo shortcut near the top of the **Account Setup** page. See below:



When you click this shortcut, the page that comes up will look like this:

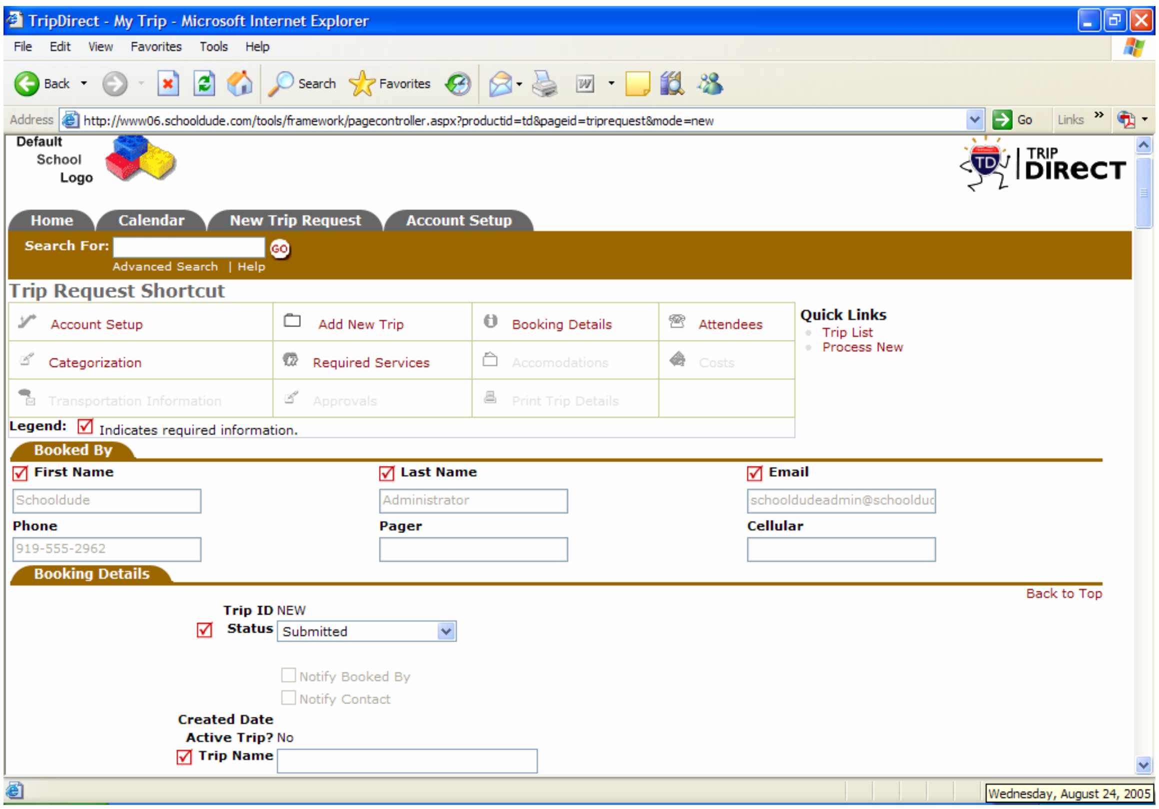


This page allows you to see how and why your data will display, either using a combo or a popup and search combination, based on the amount of data that you have. As the page explains: "When you have lots of data, the popup and search function is the fastest way to find and select data for entry fields."

Congratulations! Your Account Setup is complete!

III. Entering New Trip Requests (of Your Own): Now You're Ready To Go!

So you've got your account set up and now you want to see what TripDirect is all about? Welcome to the **New Trip Request** page! In this section, we'll walk you through the Trip Request process so that you can see how it works and learn how to make trip requests of your own. You'll also be able to see where all the information that you entered during Account Setup shows up. Here is what the **Trip Request** page should look like when it comes up:



To Request a New Trip, follow the steps below, keeping in mind that ☑ indicates a required field:

- Booked By: You'll notice, as you are logged in as the Administrator, that all of your information will already be entered into the fields of **First Name**, **Last Name**, **Email**, and any further contact information that you entered in **Account Setup**.

- Booking Details: This section is full of drop-down boxes for your convenience. Start by filling out the required information: **Trip Status**, Location (what school or location the trip will be taken from), Organization (what group is taking the trip?), and Departure and Return dates and times.
  Continue by filling in what remaining information you have that you would like to include:
  a. **Trip Package**: Choose from Trip Packages already entered into the system by the Administrator during Account Setup for trips taken on a regular basis. You can view the selected package's details by clicking on the View Trip Package link.
  b. **Driver departure and return time** (What time the driver will start and end his shift that day).
  c. **Participant Drop Off and Pick-Up times** (What time the parents should drop off and then pick up their children or where and when trip participants should arrive).
  d. **Destination Arrival and Departure dates and times** (When those on the trip will arrive and depart their destination).
  e. **Driver's Start and End Locations.**
  f. **Participant Drop Off and Pick-Up Locations**.
  g. **Estimated Mileage** of the trip.

- Trip Contact: If the "Booked By" information is the same as the "Trip Contact" information, you'll save a little time by clicking the box at the top of this section.
  If not, fill in the **First Name**, **Last Name**, and **Email Address** of the Trip Contact, as well as any other contact information you may have (telephone, pager, and cell phone numbers).

- Attendees: Who will be going on this trip? In this section, you will need to fill in the **names of any faculty attending** the trip, as well as the **number of students attending**. Any further information (**names of supervising adults, number of adults and total attendees, cost of adults and students**) should be entered here as well.

- Categorization: In this section, you can enter the budget that will be used on this trip, the recommended minimum and maximum ages of those attending the trip, and the educational objective of the trip (what do you hope to learn/accomplish with this trip?).

- Notes: This is where you can make note of any special needs or requirements for the trip.

SCHOOLDUDE SAYS: In the following three sections, you will choose what services (transportation, food, and maintenance) will be needed on this trip. Once you choose the services you will need for a trip, those services will show on the **Home** page in the **To Do Tasks** section one week prior to the trip departure date. These Tasks serve as a reminder to the service providers (maintenance, cafeteria, etc.), letting them know that their services will be needed within the week and that they will need to take the necessary steps to prepare for those services.

Clients with our **MaintenanceDirect** and **ITDirect** products can create work orders through these sections.

- Required Services:
  ✓ Select, from the drop-down box provided, the **Transportation Type** you will be using.

  ✓ Food Services: In this section, choose any food service that you plan on using for the trip by clicking the check box on the left-hand side. For the food service you choose, enter the number of meals that will be needed, indicate whether or not that number of meals should be cancelled at the school by the cafeteria staff, and enter any **notes** you wish to include (vegetarian, food allergies, etc.).

  ✓ Maintenance Services: Select from the list any maintenance services that will be needed in connection with this trip. After clicking the selected check box, enter any **notes** you wish to include (activity busses will need to be cleaned afterward, etc.)

SCHOOLDUDE SAYS: For the remaining fields on this page before the final Approval step, you'll notice that you are unable to enter any information. That is because until a trip request is submitted and approved, none of these issues (transportation, accommodation, and estimated or actual costs) are relevant. They will only be accessible after a trip request has been submitted and is in the **Approval** process. Therefore, move past the next four sections and go directly to Approval.

- Estimate Costs
- Transportation (Drivers, Vehicles, Vendors)
- Actual Costs
- Accommodations

- Approval: You'll find this section at the bottom of the **New Trip Request** page.

Here, you can:

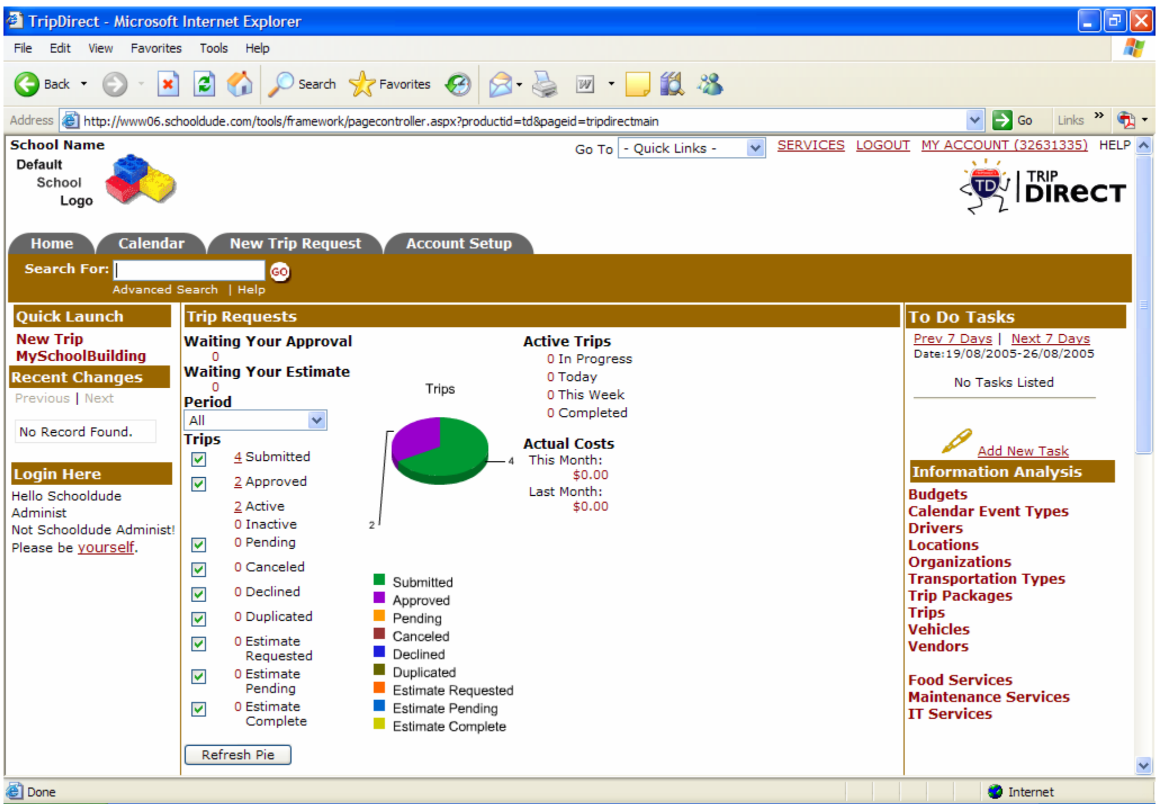
a.) **Approve** a trip by routing it on to the next user for approval, choosing their name from the drop-down box.

OR

b.) You can **Activate** the trip by clicking the check-box next to the words "**Activate Trip Request**?"

- Click Save at the bottom of the page to save the trip request.

When the page refreshes, you will be taken back to the top of the same page where you will see the words "Record Saved Successfully" in red underneath the Trip Request Shortcut menu. Your trip request has been saved.
Your new trip request will show on the **Home** page, in the section titled "**Trip Requests**".



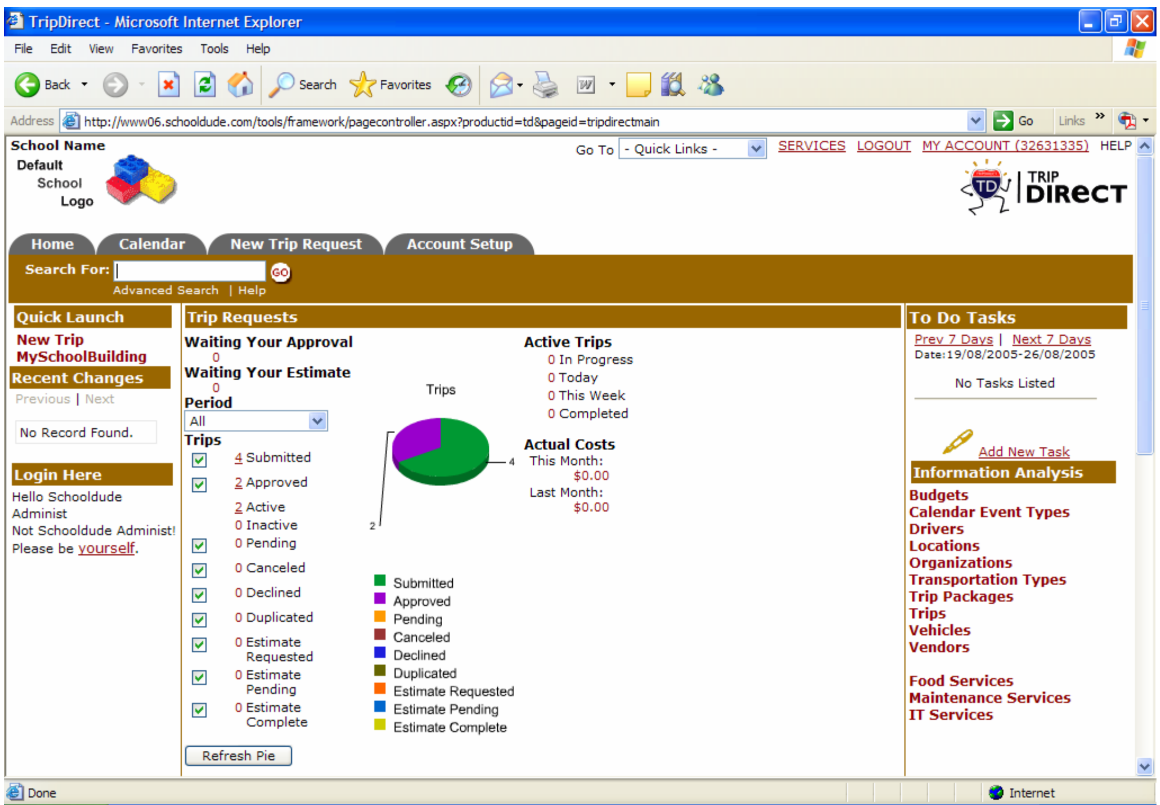
SCHOOLDUDE SAYS: Active trips "lock" your asset assignment and designate a finally approved trip.

IV. Approving/Activating Trip Requests (Entered By Others): Get Things Rolling (Literally!)

Once you've set your account up and have all the information in that requesters will need, the trip requests will start coming in and it will be up to you to decide what to do with them. In this section, you will learn how the trip approval process works and better yet, how to make it work best for your educational facility.

1. Before You Get Started:

First, here is a closer look at what you'll find on your **Home** page and how you can adjust the options there to work best for you.



On the TripDirect **Home** page, you will notice a section titled **Trip Requests**. This section shows (numerically as well as on a handy pie chart) the statuses of various trip requests out there. Trip requests awaiting your approval or your estimate show up first and foremost in the top left-hand corner. Below them is the pie chart (which shows up only after trip requests have started being submitted), which can be manipulated to show just what you need it to.

- To adjust the time period shown on the chart, click on the drop-down box provided (labeled "Period") and choose what time period you would like to see on the chart (all, today, last week, this week, etc.). Once chosen, the page will refresh and the chart will adjust accordingly.

Back up near the top, just beneath the **Period** drop-down box, you will see a list labeled "**Trips**". This list shows all possible statuses that a trip can hold, along with a number indicating how many trips currently hold that status. Next to each listed status, you will notice a check-box with a green check in it which indicates that the trips that hold that particular status are reflected in the pie chart.

- To remove a status from the list so that trips with that status will not be reflected in the pie chart, click on the green check in the check-box next to that status. The page will refresh and you will see that the status and its color will have been removed from the pie chart and its legend below.

Finally, there are two small sections titled **Active Trips** and **Actual Costs**.

Active Trips shows you the number of trips that are In Progress, Today, and This Week. If there are any to list, you can click on the number to see the trip details.

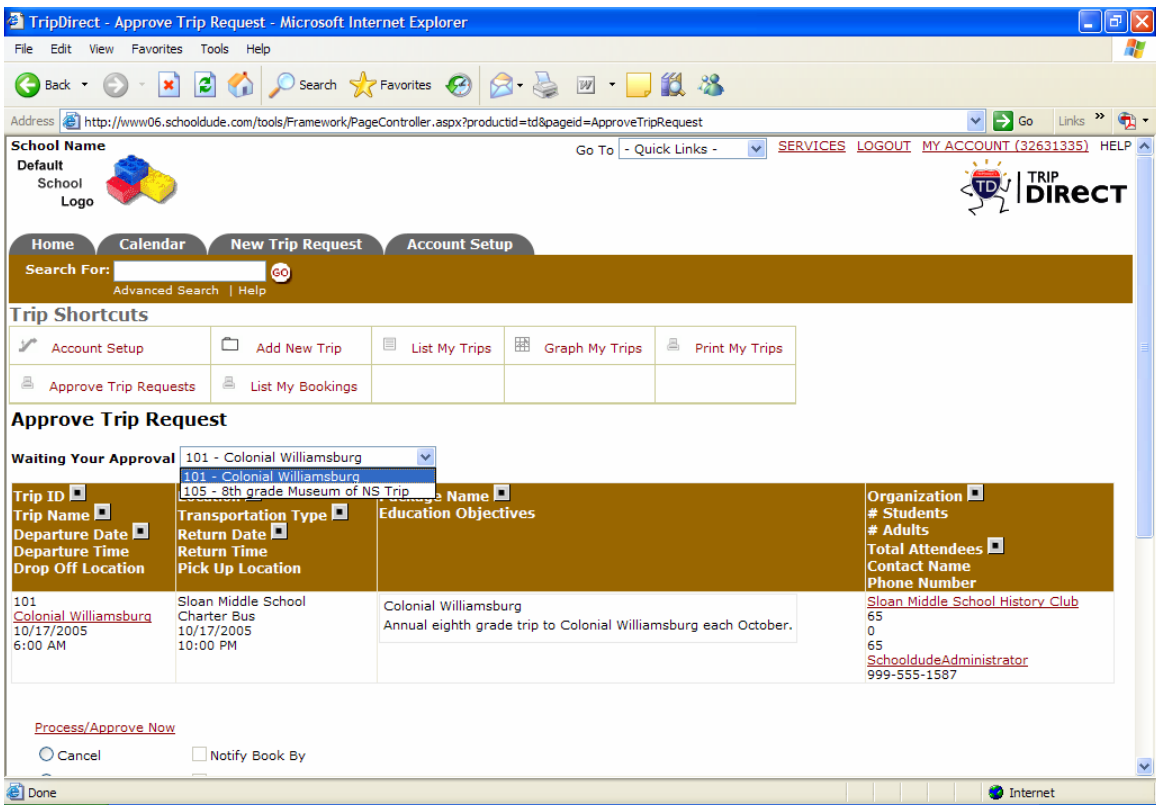
Actual Costs shows the total amount spent on trips this month and last month.

2. Approving a Trip:

To start approving submitted trip requests, follow these steps:

- Click on the number of requests next to the words "Waiting Your Approval" on your **Home** page. This will take you to the **Approve Trip Request** page.

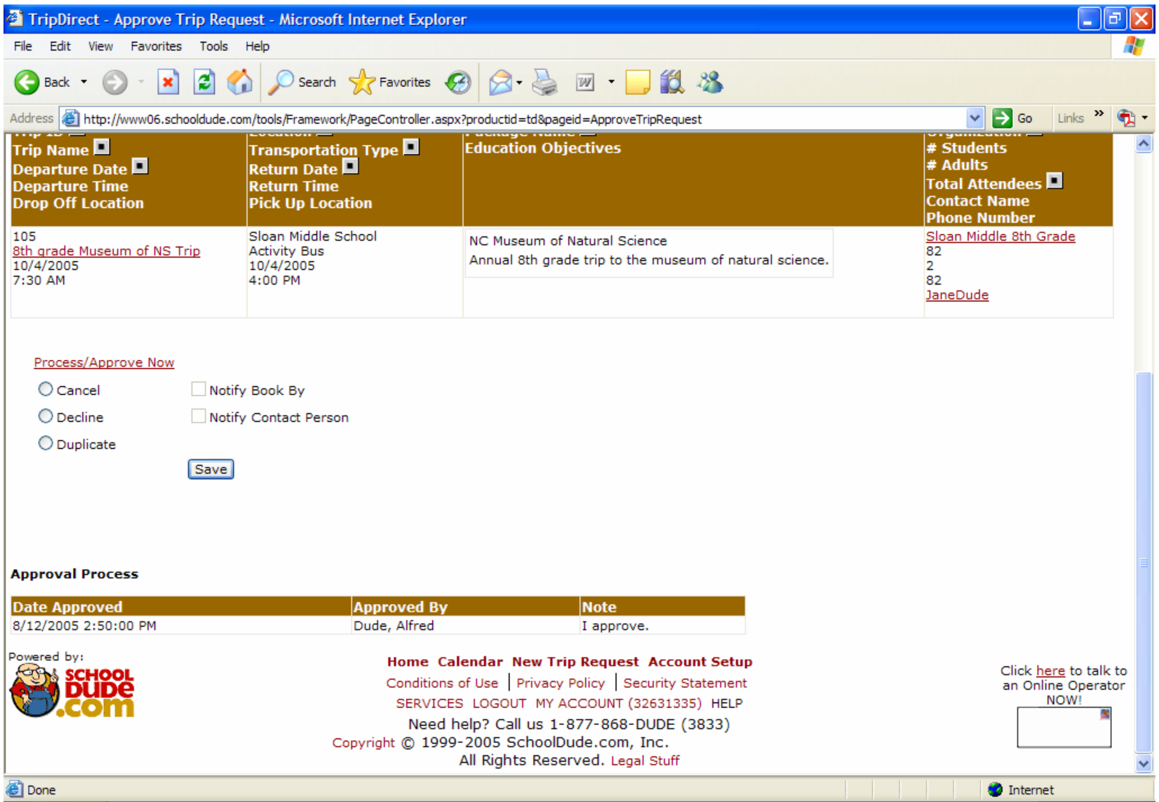
- The **Approve Trip Request** page shows one trip at a time so choose the first trip you wish to address from the drop-down box next to the words "Waiting Your Approval".



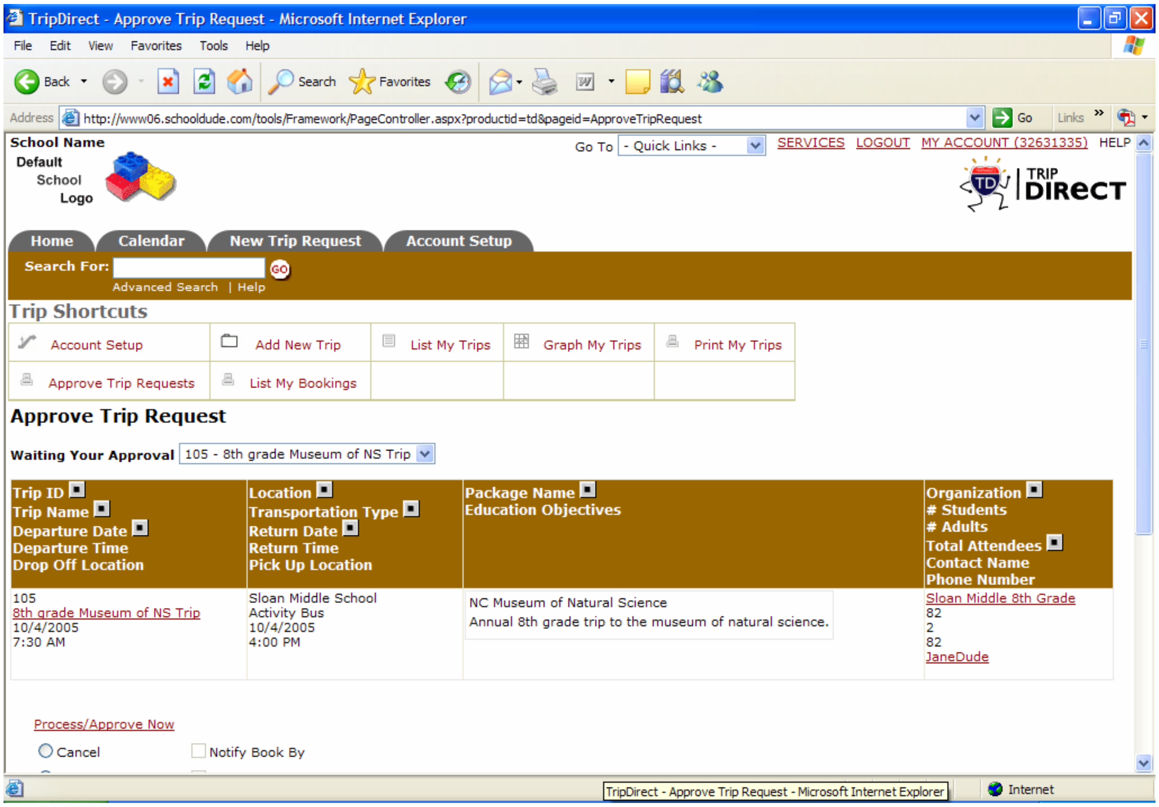
- When the page refreshes, the trip will be listed, along with its basic information, near the bottom of the page.
  You can choose the action you will take on this trip "at a glance" based on the information you see here by clicking in the circle next to the action you wish to take near the bottom of the page and then clicking Save.

- To approve and process a trip request, click on the link (shown in red) that says Process/Approve Now.

If you wish to do anything other than approve a trip (Cancel, Decline, Duplicate), do it here.



- To see the trip's information in more detail and to make any changes before approving a trip, start by clicking on the Name of the trip (shown in red near the bottom of the screen) or the Process/Approve Now link.



- From either of those links, you will be taken to the trip request itself, where you can read over all the trip details. Make any changes you wish to make and note those changes in the **Approval Note** field near the bottom of the page. You can choose vendors, drivers, and vehicles on this page, as well as enter any related costs.

- To approve the trip request, click the check box next to the word "**Approve?**".

- You can choose to route the trip request on to someone else by choosing their name from the Route to Next drop-down box. Leave the box blank if you want to allow the system to route the request for you based on information already defined in the routing setup.

- To activate a trip and get the preparation process rolling, click the check-box next to the words "**Activate Trip Request**?". When the screen refreshes, you will see the date and time of your approval listed next to the words "**Approval Process**". Your approval has been saved.

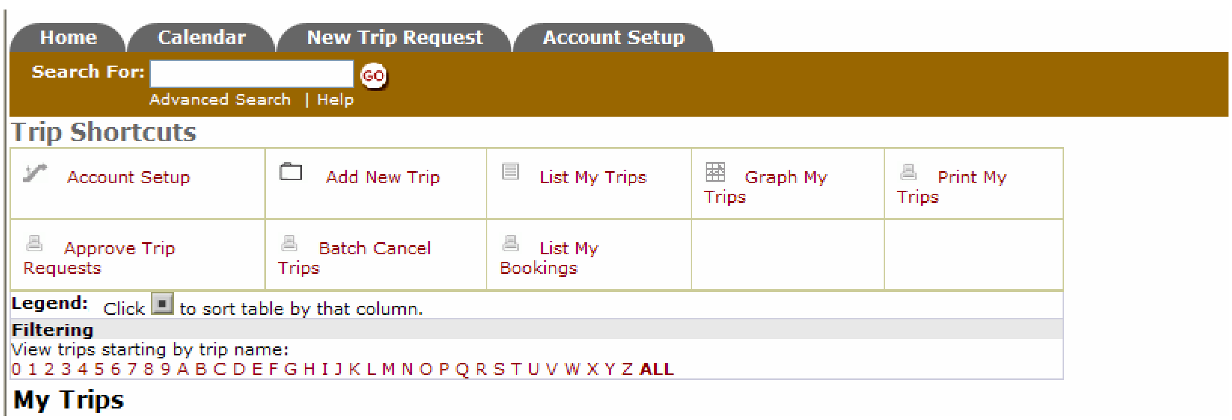
- Click on any of the links in red at the bottom of the screen to proceed to where you'd like to go next. Changes will reflect in the information shown on your **Home** page.

V. Reports: Listing, Graphing, and Printing Your Trips

SchoolDude provides you with the option of listing, graphing, and printing any and all of your trips, along with their information for your convenience and for your records. Follow these steps and you'll have hard copies and visual aids for all of your trip information at your fingertips.

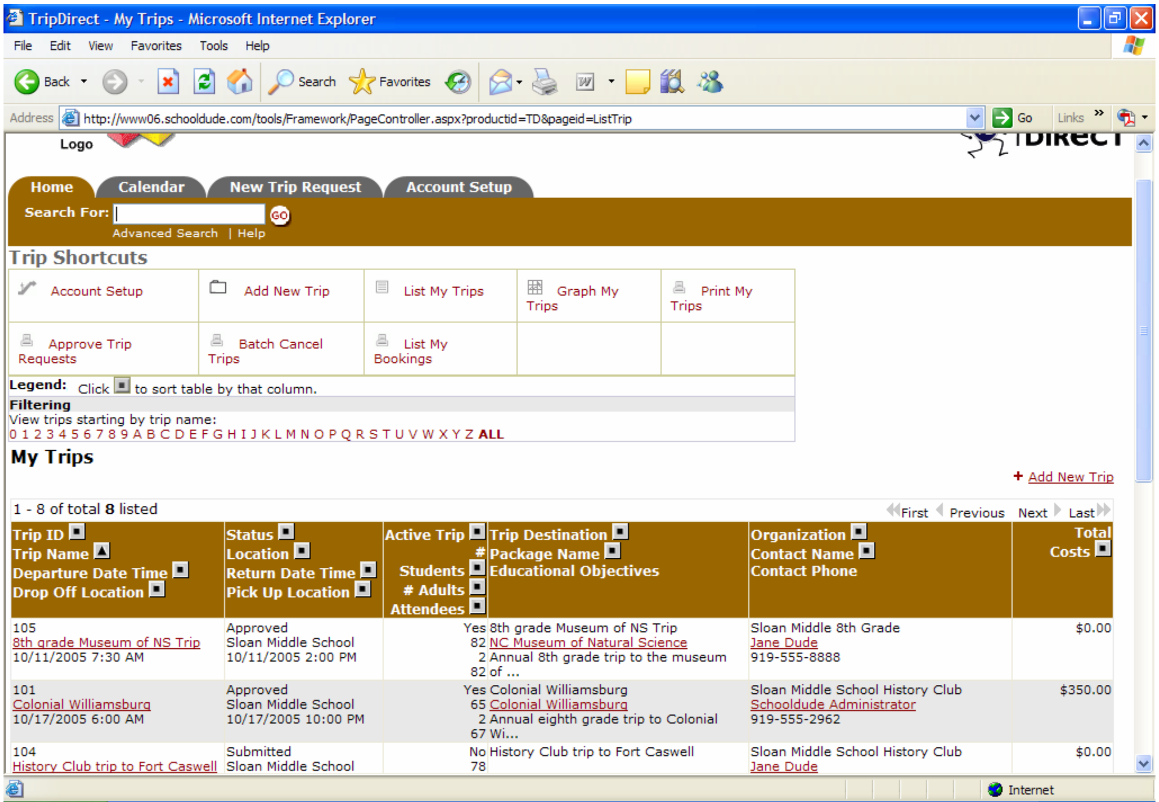
Listing:

1. From your Home page, click on any of the numbers listed for trips that have been entered into TripDirect, no matter what the status.
2. You will be taken to the Approve Request page or a version of the My Trips page, depending on the link you click, which will show the information indicated by the number you clicked on. This could be trips waiting to be approved, pending trips, trips that have been declined, etc.
3. At the top of this page, you will see the shortcuts listed along the top. They will look like this:



To list your trip information, do the following:

- Click on the List My Trips shortcut.
- You will be taken to the **My Trips** page, which will look something like this:

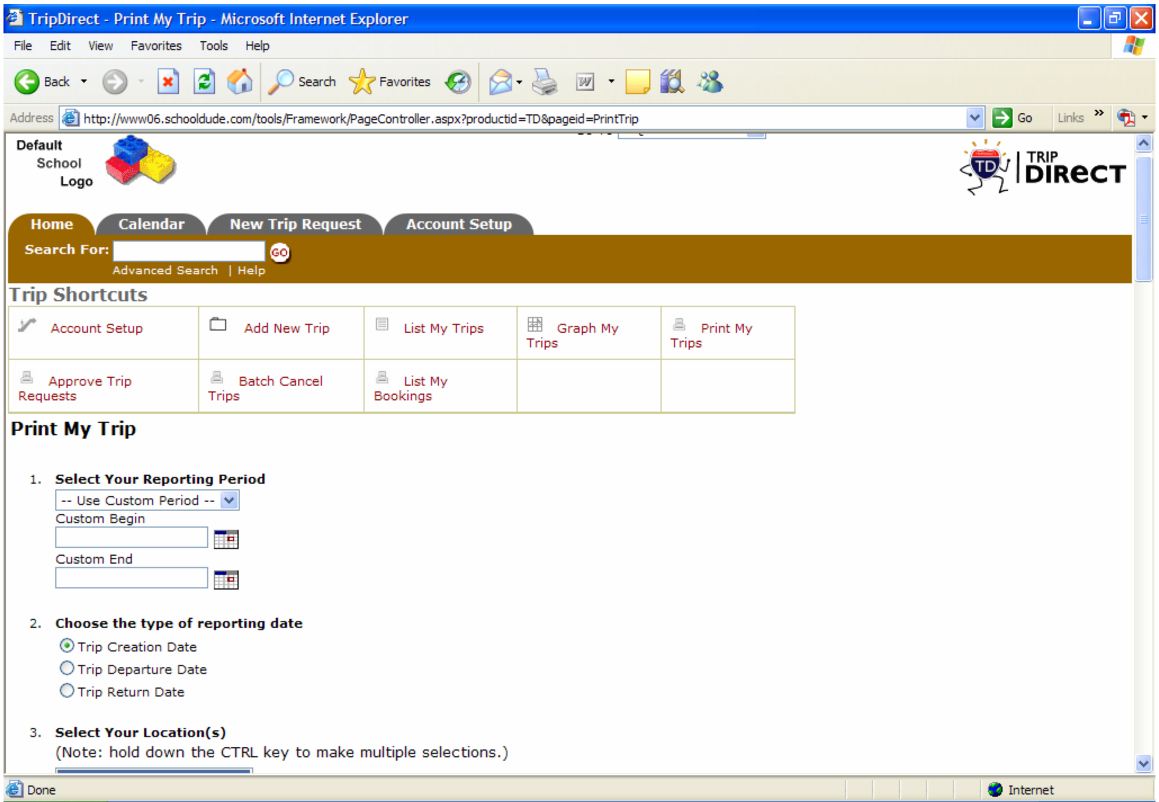


You will see information listed for all trips in the TripDirect system. View trip details by clicking on the Trip Name, Package Name, Destination, and Contact links, shown in red.

To view only trips that you have requested/booked, click on the List My Bookings shortcut at the top of the My Trips page. This will list only trips requested by you.

Printing:

- Click on the Print My Trips shortcut.
- You will be taken to the **Print My Trip** page, which will look like this:



- Select the date(s) of the trip or trips you wish to print, choosing a time frame from the drop-down box provided or entering a Custom Period. To do this, simply leave Use Custom Period in the drop-down box and enter the Custom Begin and End dates in the two boxes provided below.
- Choose the type of reporting date that you would like to view for printing. In other words, would you like to pull trips based on creation date, departure date, or return date?
- Choose the Location that the desired trip is or was for. In other words, who is taking or who took the trip? What location were they from?
- Choose the name of the Organization that went on the trip.
- Select the Trip Name from the list provided.
- Select the name of the Driver for that trip.
- Select Vehicle(s) used.
- Select Vendor(s) used for this trip.
- Select the Status that the trip currently holds.
- Select any Budget used.

- **Choose trip with Package**: What this means is that you can indicate here whether or not the trip you wish to print is part of a Trip Package.
- Indicate the "active" status of the trip or trips you wish to view by clicking Yes, No, or Both.
- To select the Trip ID range, enter the Trip ID numbers in the range that you would like to print (in other words, "from this trip to this trip").
- Choose what Type of report you would like to view for printing—either Summary or Detail.
- Choose your report format: PDF or Excel spreadsheet.
- Click Print This! and you're done!

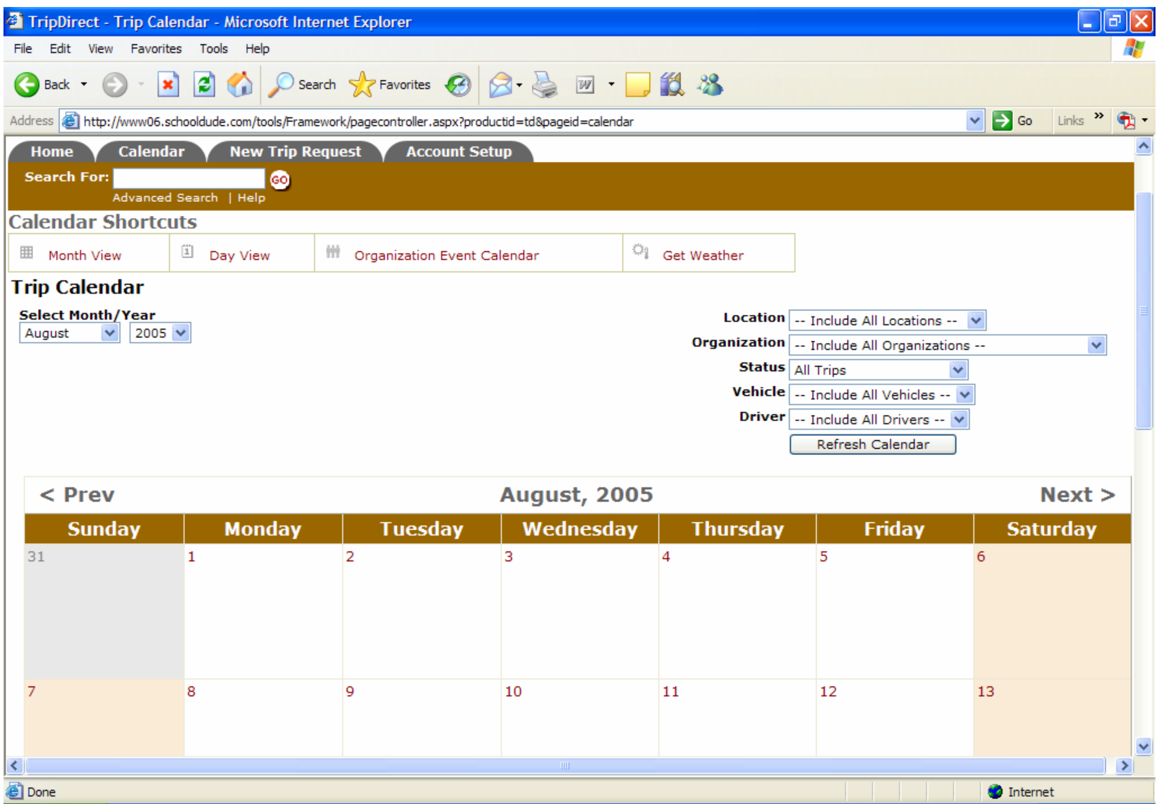
Graphing: Coming Soon!

VI. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, TripDirect has a **Calendar** tab—a place you can go to see what's going on, where, when, and who's involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we'll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the Calendar tab at the top of your screen.

The page that opens up will look like this:

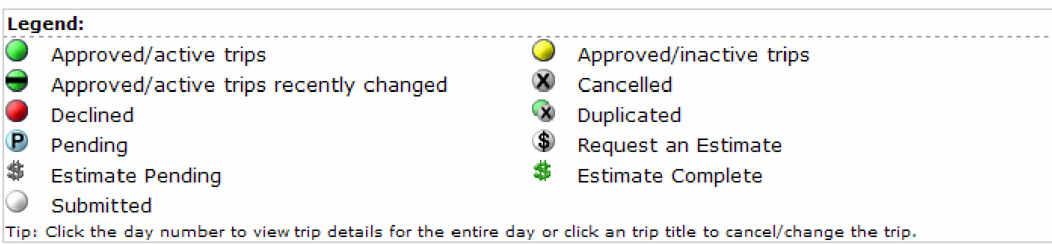


At the top of your screen, just above the words "**Trip Calendar**", are the **Calendar Shortcuts**: Month View, Day View, Organization Event Calendar, and Get Weather.

1. The **Month View** page shows you what's going on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The month you're currently in will display with arrows in the top left and right-hand corners that you can click on to navigate to **Previous** months or months coming **Next**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the **Prev** and **Next** buttons.

On the **Month View**, each day shows in the traditional squares of a calendar, which contain any activity that may be going on: Trip Name and Number, along with a colored dot or symbol, which indicates that trip's status. The calendar legend is located near the bottom of the Month and Day View pages and looks like this:



- To obtain detailed information about a trip showing up on your calendar, simply click on the Name of that trip (shown in red) and you will be taken to the **Trip Request** page, containing all information recorded for that particular trip.

SCHOOLDUDE SAYS: By placing your mouse (no need to click) over the trip name on the month view of your calendar, the date/time information will appear in a small white box.

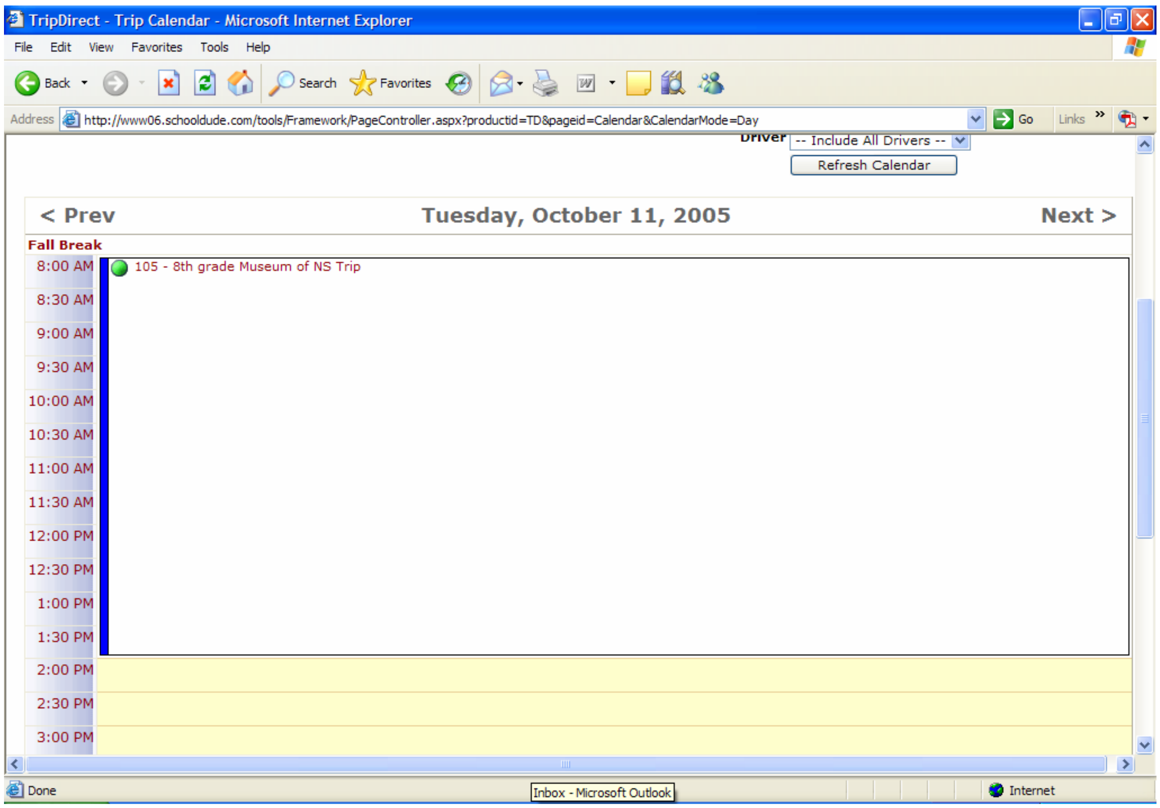
Just below the Shortcuts, on the right-hand side of the page, you will see a series of drop-down boxes. What these allow you to do is sort and filter your current month's calendar based on **Location**, **Organization**, **Status**, **Vehicle**, or **Driver**. Choosing one of these and then clicking the Refresh Calendar button will show only trips fitting into that particular category.

To get a report on the weather, click on the Weather Icon, which appears on the calendar on today's date. You'll be taken to AccuWeather.com, which will pop up in a separate window.

2. The **Day View** page can be reached in two ways:

- Clicking on the Day View shortcut at the top of the page, or
- Clicking on the number of the date on the monthly calendar.

The Day View shows you what's going on, one day at a time, in half-hour increments. For example, if you have one trip on a particular day leaving at seven-thirty in the morning and returning at two, all 30-minute slots will be covered by that one trip between the hours of seven-thirty and two. See Below:



Note that only the hours of 8:00 a.m. to 5:30 p.m. will show on the Day View of the calendar. Trips occurring or extending after that amount of time will not be shown.

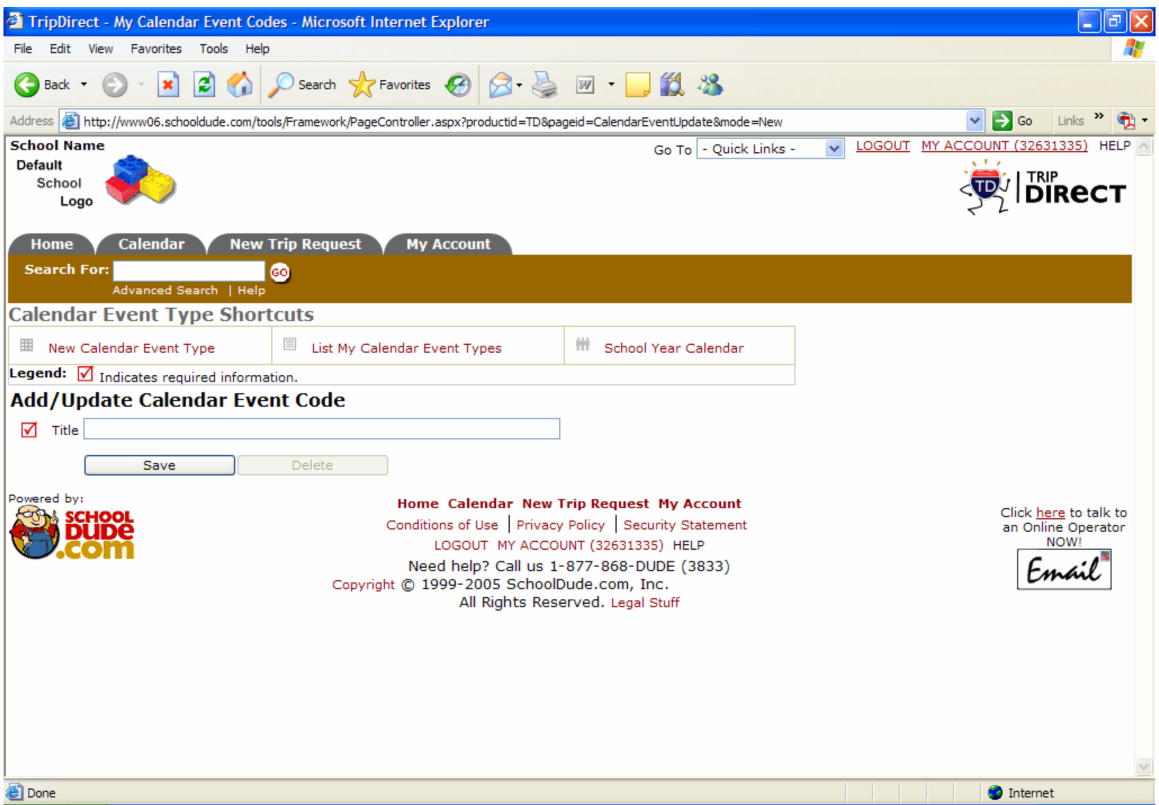
As with the Monthly View, you can navigate your **Day View** calendar by using the Prev and Next buttons in the top corners.

3. The **Organization Event Calendar** page is where you can enter events, such as school breaks, for organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and listed in more detail on the right-hand side.

To enter an event into the **Organization Event Calendar**, you'll need to start by creating an **Event Title** for that event and proceeding from there:

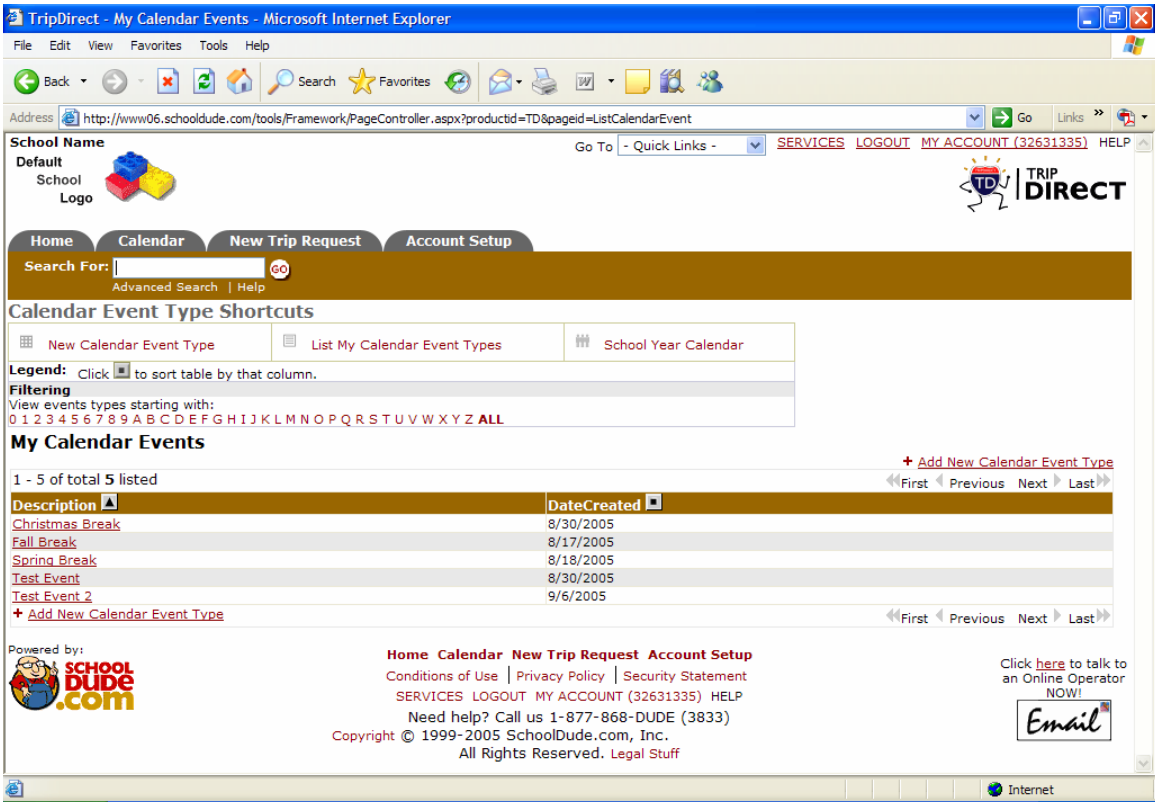
- To enter your **Event Title**, click on the Event Title link (shown in red above the Select Event Title drop-down box).

- Clicking on the Event Title link will take you to a new page titled **Add/Update Event Code**. In the box provided next to the word Title, enter the title of the event. See below:



- Click Save.

- You will then be taken to the **My Calendar Events** page where all events you enter will be listed and where you can edit or delete events by clicking on that event's Title. Below is a view of the My Calendar Events page, once several events have been added:



- Return to the **Organization Event Calendar** page by clicking on the Organization Event Calendar shortcut near the top of the page.

To continue with the next steps of adding an event to the Organization Event Calendar after creating all of your event titles, follow the steps below:

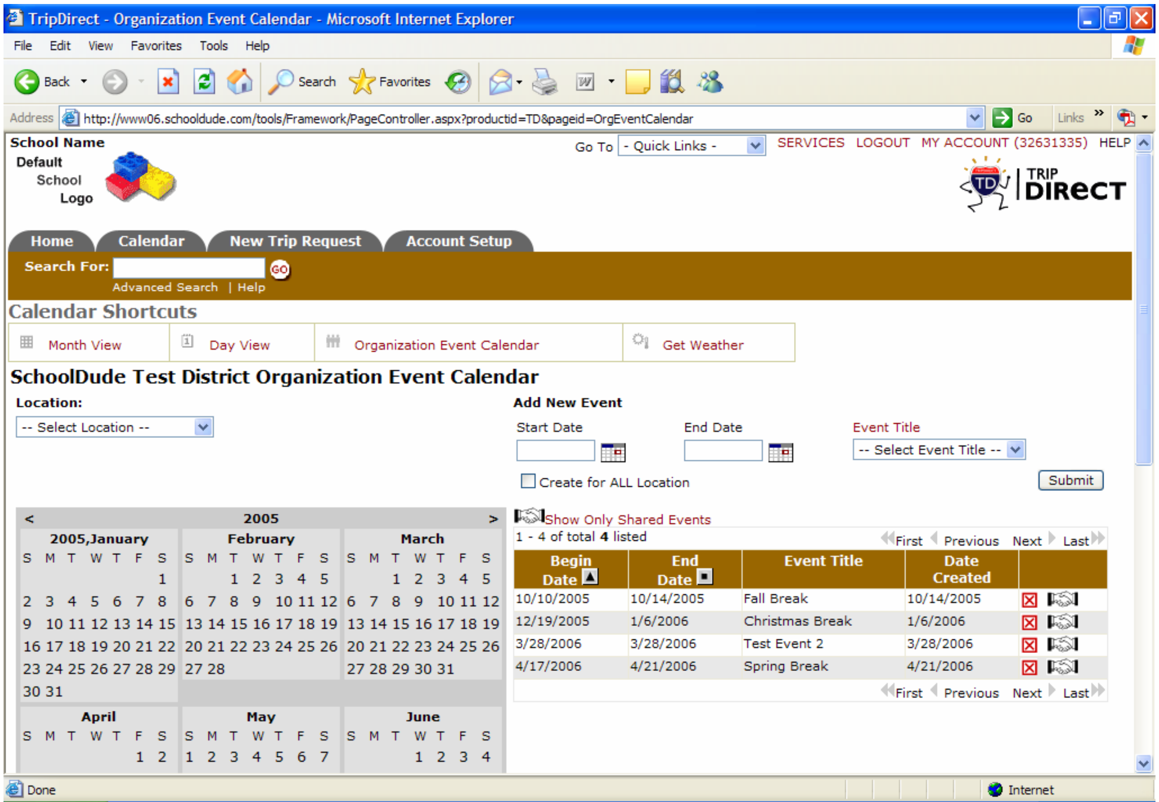
- Back on the **Organization Event Calendar** page, choose a Location for the event from the drop-down box provided. If using "All Locations", click on the check-box marked **Create For ALL Locations** directly below the date fields.

- Select a Start Date and End Date for the event.

- Select the Event Title.

- Click Submit.

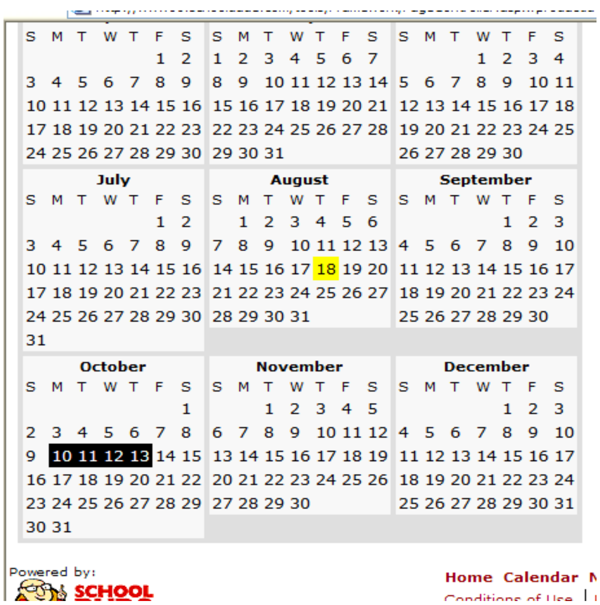
When the page refreshes, your event will be listed on the **Organization Event Calendar** page, to the left of the yearly calendar. See below:



A Few More Things About the Calendar:

When you enter an event into the Organization Event Calendar, that event's date or dates will show as highlighted in black on the yearly event calendar on the left-hand side of the page.

Below is an example which shows that Fall Break will be from October 10-14. Its dates have been highlighted in black on the calendar.



- To delete an Event entered onto the list and the calendar on the **Organization Events Calendar** page, simply find that item on the list and click the ☒ on the right-hand side, next to the event you wish to delete (see below).

- To edit an Event's information once it's been entered into the Organization Event Calendar, enter the Event again into the calendar, using the corrected information, and then delete the previously entered incorrect Event from the list.

- To show only "Shared" events, that is, events shared by all Locations, click on the Show Only Shared Events link (shown in red) next to the clasped hands icon ( ). This link is located above the list of events (see next page).


Add New Event
Start Date
End Date
Event Title
-- Select Event Title --
Create for ALL Location
Submit
Show Only Shared Events
1 - 1 of total 1 listed
First Previous Next Last
Begin Date
End Date
Event Title
Date Created
10/10/2005
10/14/2005
Fall Break
10/14/2005
First Previous Next Last

4. The **Get Weather** shortcut, as with the weather icon on the main monthly Calendar, serves as a link to connect you with **AccuWeather.com** where you can check current weather conditions in your area or the area of your trip destination. You can also check the forecast with a range up to fifteen days.

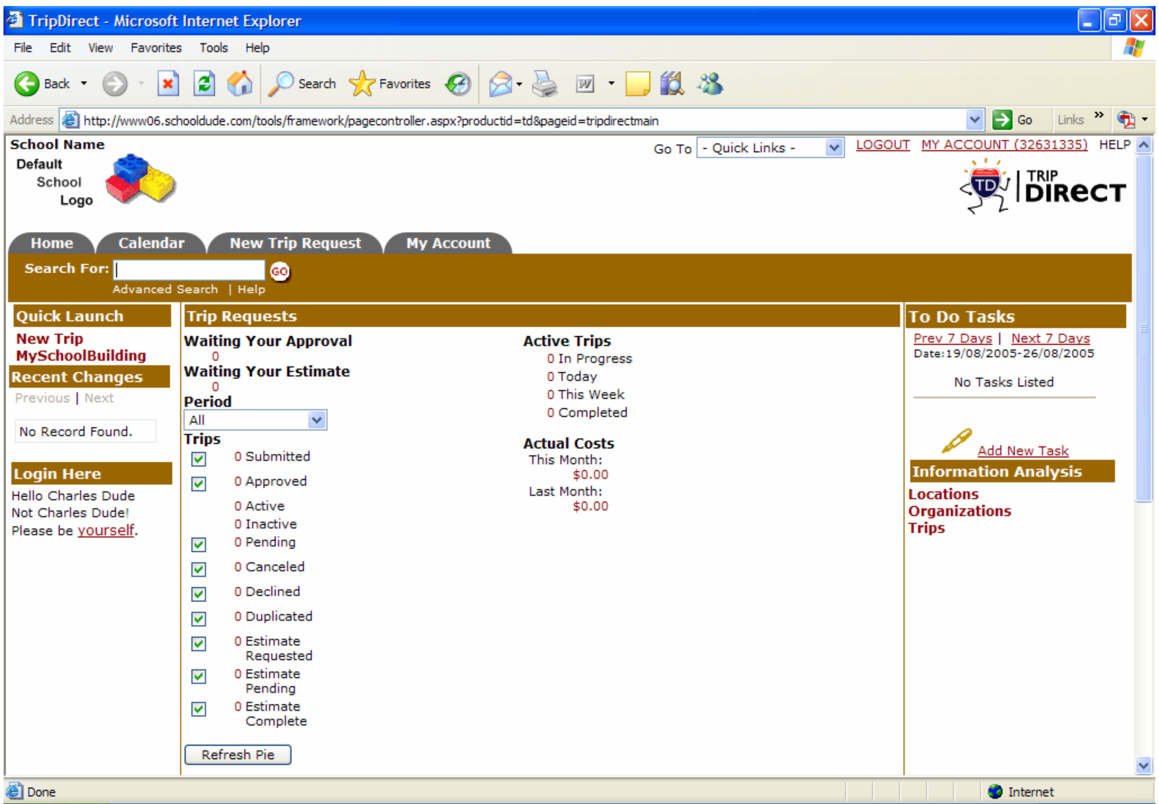
- Simply click on the Get Weather shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.

Site Administrator 1 Guidelines

I. Welcome to the Home Page! Now What?

(A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this:



Your **Home** page has several components. Across the top of the page, there are four tabs reading: **Home**, **Calendar**, **New Trip Request**, and **My Account**. Currently, you are looking at the Home page which contains the following:

1. **Quick Launch** gives you shortcuts to create a New Trip or to reach the MySchoolBuilding.com page.

2. **Login Here** shows who you're logged in as. Here, you can log in as yourself if you are logged in incorrectly.

3. **Recent Changes** shows you any changes made in a time period which the administrator will specify as "recent" during the Account Setup process. This could be a number of hours or a number of days.

4. **Trip Requests** contains information on the status of requested trips that are routed to you for approval. The number of trips that are submitted, approved, pending, canceled, declined, duplicated, and estimated are all listed and represented on a color-coded pie chart (which appears after the first trip request has been submitted). Trips awaiting your approval or estimate are listed here, as well as Active trips and Actual Trip Costs for this month and the last.

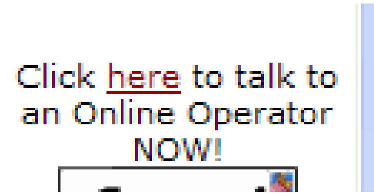
5. **Upcoming Events** tells you of any trips within the next week, along with trip-related details such as departure and return times, total number of students attending, name of organization taking the trip, etc. Upcoming Events can be sorted by Location or Organization by choosing which one you wish to see from the drop-down boxes provided.

6. **To Do Tasks** lets you know of any maintenance, food, or IT services that will be needed for trips occurring during the next week. This section will act as a reminder to you as well as to those service providers who log on to see what needs to be done in the week to come.

7. **Information Analysis** provides important links where you can view information on Locations, Organizations, and Trips entered into the system, including lists, graphs, and the option to print reports.

8. **HELP** links are available in both the top and bottom right-hand corners of your Home page. Clicking on the Help link in the top right-hand corner will take you to the TripDirect product manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from

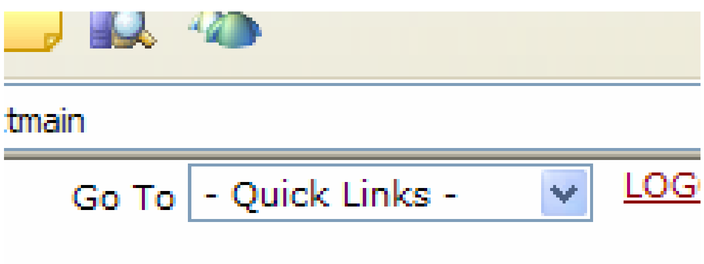
SchoolDude Support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:



To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The Email link looks like this:

A blank email form will pop up, already addressed and ready to use.

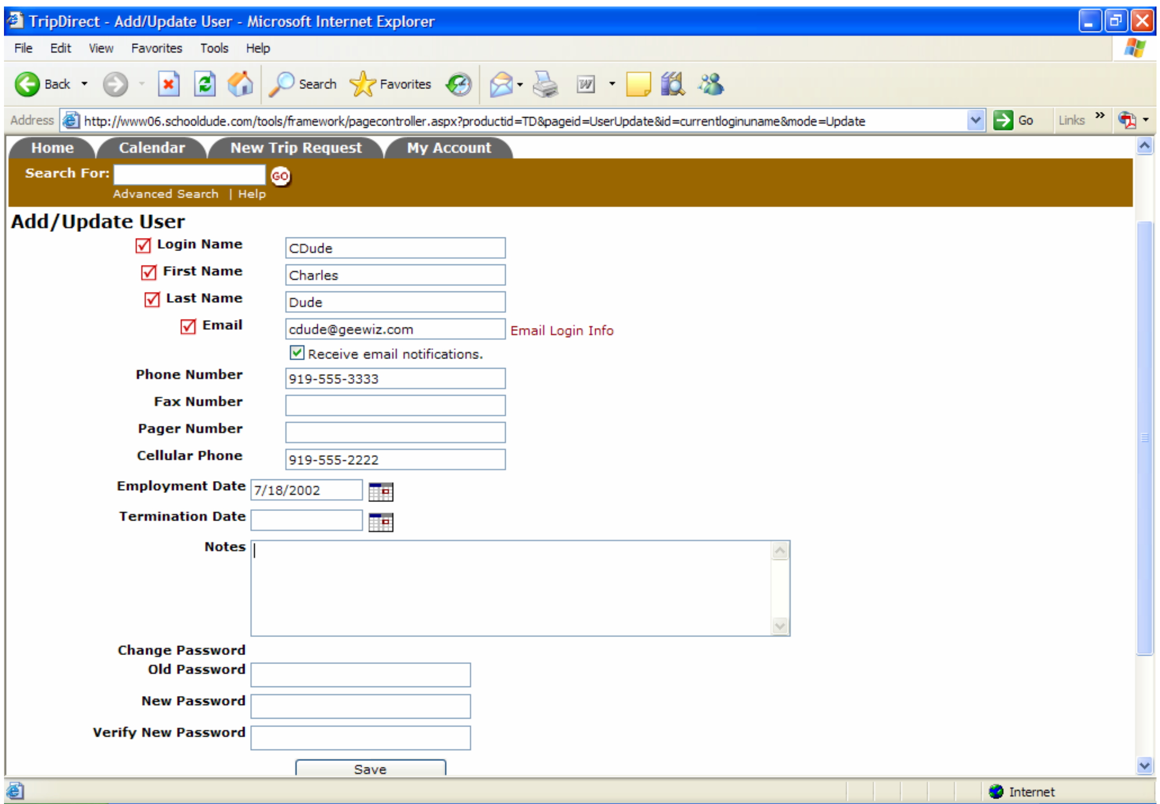
9. The Quick Links provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from TripDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's **Home** page automatically. Quick Links is located at the top of the Home page screen, near the right-hand corner and looks like this:



II. My Account: Your Personal Account Information.

On this page, you can view and edit your account information, entered during the Account Setup process by the Administrator. Fields marked with ☑ are required information. The rest of the information, however, is optional and changes can be made at any time.

Enter any contact information you wish to include (cell phone number, fax, etc.) as well as any notes. To change your password and/or update any information that you have entered, follow the steps below:



- Enter your old password, set by the Administrator, into the Old Password field.

- Choose a new password and enter it twice, into the New Password and Verify New Password fields.

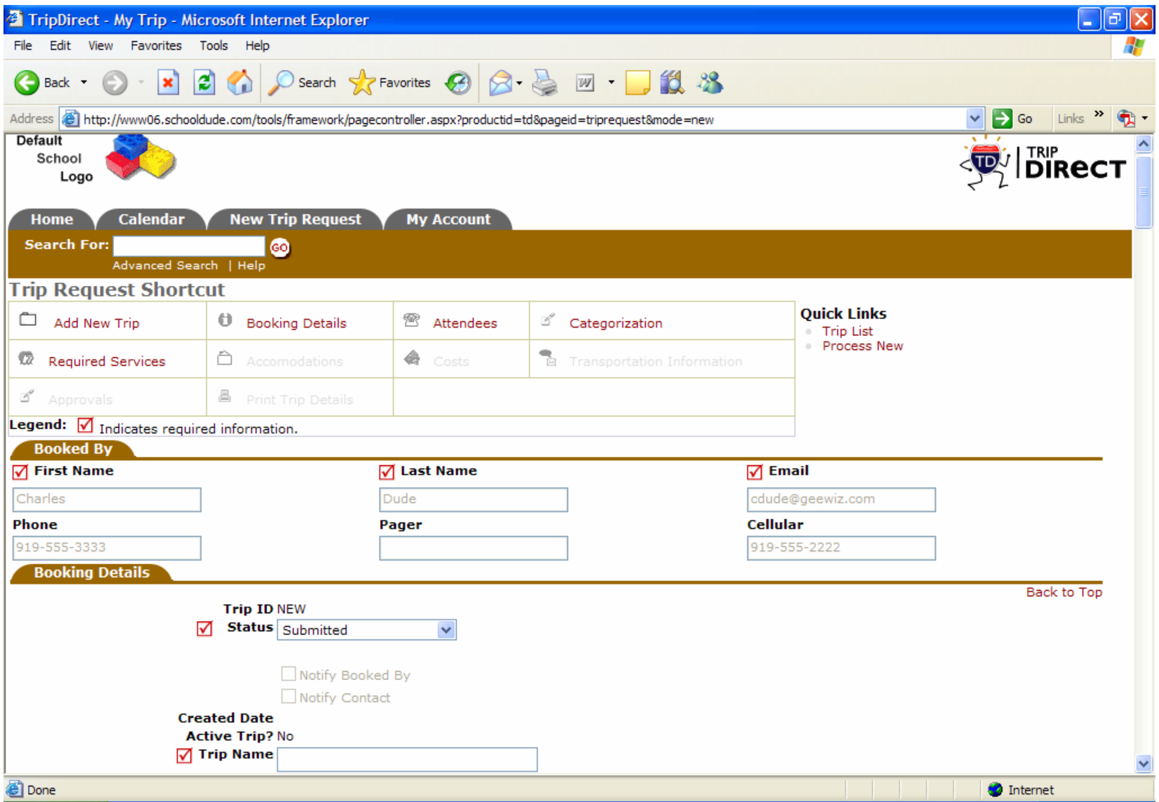
- Click Save.

You will then be taken back to your **Home** page. Your information has been saved. To change or update it at any time, click on the My Account tab and repeat the steps listed above.

III. Entering New Trip Requests (of Your Own):
Now You're Ready To Go!

Welcome to the **New Trip Request** page! In this section, we'll walk you through the Trip Request process so that you can see how it works and learn how to make trip requests of your own.

This is what your Trip Request page should look like when it comes up:



To request a New Trip, follow the steps below, keeping in mind that ☑ indicates a required field:

- Booked By: You'll notice that all of your information is already entered into the fields of **First Name**, **Last Name**, **Email**, and any further contact information provided on your **My Account** page.

- Booking Details: This section is full of drop-down boxes for your convenience. Start by filling out the required information: **Trip Status**, Location (what school or location the trip will be taken from), Organization (what group is taking the trip?), and Departure and Return dates and times.

Continue by filling in what remaining information you have that you would like to include:

a. **Trip Package**: Choose from Trip Packages already entered into the system by the Administrator during Account Setup for trips taken on a regular basis. You can view the selected package's details by clicking on the View Trip Package link.
b. **Driver departure and return time** (What time the driver will start and end his shift that day).
c. **Participant Drop Off and Pick-Up times** (What time the parents should drop off and then pick up their children).
d. **Destination Arrival and Departure dates and times** (When those on the trip will arrive and depart their destination).
e. **Driver's Start and End Locations.**
f. **Participant Drop Off and Pick-Up Locations**.
g. **Estimated Mileage** of the trip.

- Trip Contact: If the "Booked By" information is the same as the "Trip Contact" information, you'll save a little time by clicking the box at the top of this section.
  If not, fill in the First Name, Last Name and Email Address fields for the Trip Contact as well as any other contact information you may have (telephone, pager, and cell phone numbers).

- Attendees: Who will be going on this trip? In this section, you will need to fill in the names of any faculty attending the trip, as well as the number of students. Any further information (names of supervising adults, number of adults and total attendees, cost of adults and students) should be entered here as well.

- Categorization: In this section, you can enter the budget that will be used on this trip, the recommended minimum and maximum ages of those attending the trip, and the educational objective of the trip (what do you hope to learn/accomplish with this trip?).

- Notes: This is where you can make note of any special needs or requirements for the trip.

SCHOOLDUDE SAYS: In the following three sections, you will choose what services (transportation, food, and maintenance) will be needed on this trip. Once you choose the services you will need for a trip, those services will show on the **Home** page in the **To Do Tasks** section one week prior to the trip departure date. These Tasks serve as a reminder to the service providers (maintenance, cafeteria, etc.), letting them know that their services will be needed within the week and that they will need to take the necessary steps to prepare for those services.

Clients with our **MaintenanceDirect** and **ITDirect** products can create work orders through these sections.

- Required Services:
  ✓ Select, from the drop-down box provided, the Transportation Type you will be using.

  ✓ Food Services: In this section, choose any food service that you plan on using for the trip by clicking the check box on the left-hand side. For the food service you choose, enter the number of meals that will be needed, indicate whether or not that number of meals should be cancelled at the school by the cafeteria staff, and enter any notes you wish to include (vegetarian, food allergies, etc.).

  ✓ Maintenance Services: Select from the list any maintenance services that will be needed in connection with this trip. After clicking the selected check box, enter any notes you wish to include (activity busses will need to be cleaned afterward, etc.)

SCHOOLDUDE SAYS: For the remaining fields on this page before the final Approval step, you'll notice that you are unable to enter any information. That is because until a trip request is submitted and approved, none of these issues (transportation, accommodation, and estimated or actual costs) are relevant. They will only be accessible after a trip request has been submitted and is in the **Approval** process. Therefore, move past the next four sections and go directly to Approval.

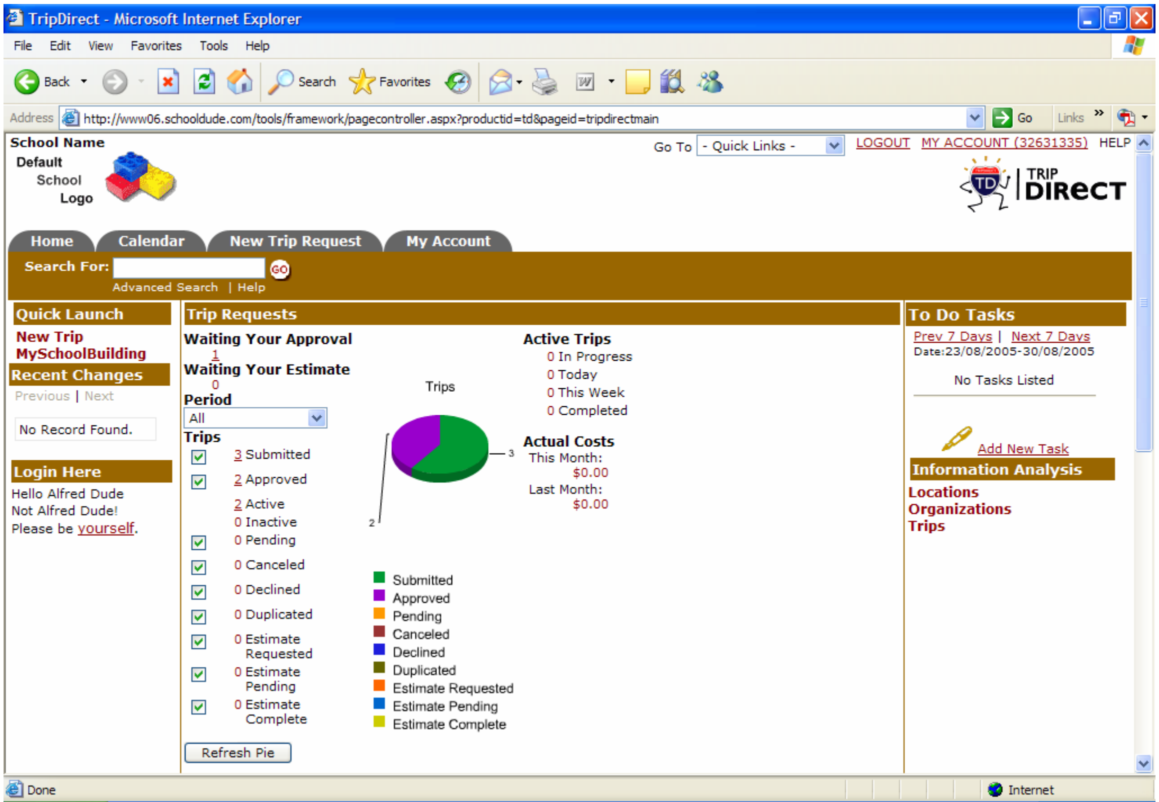
- Estimate Costs
- Transportation (Drivers, Vehicles, Vendors)
- Actual Costs
- Accommodations

- Approval: You'll find this section at the bottom of the **New Trip Request** page.
  Here, you will see the **Current Route to Approval Process** which will show "**No Record Found**" until after you've saved your request.

- Click Save at the bottom of the page to save the trip request.

When the page refreshes, you will be taken back to the top of the same page where you will see the words "Record Saved Successfully" in red underneath the Trip Request Shortcut menu. Your trip request has been saved.

Your new trip request will show on the **Home** page, in the section titled "**Trip Requests**".

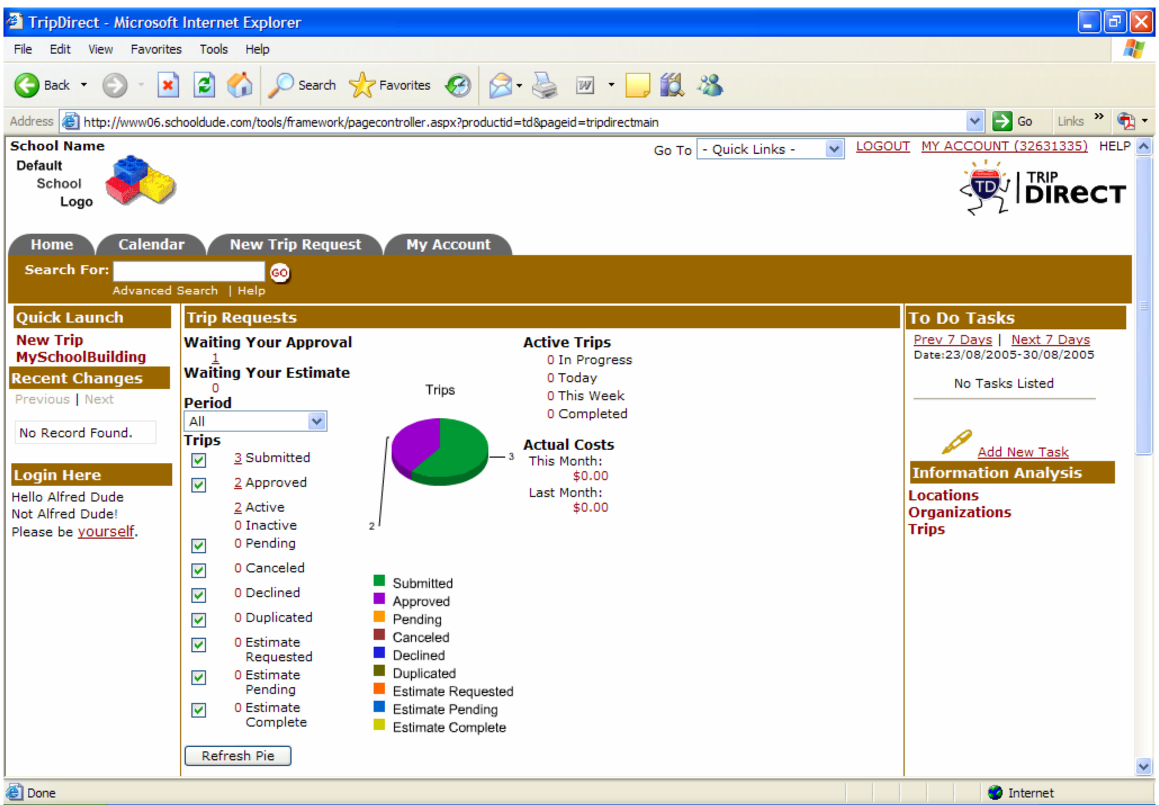


IV. Approving Trip Requests (Entered By Others): Get Things Rolling (Literally!)

Once your educational facility is up and going with TripDirect, the trip requests will start coming in and it is up to you, as a Site Administrator 1, to approve those trips routed to you. In this section, you will learn how the trip approval process works so that you can do your part in getting those trips on the road!

1. Before you get Started:

First, here is a closer look at what you'll find on your **Home** page and how you can adjust the options there to work best for you.



On the TripDirect Home page, you will notice a section titled Trip Requests. This section shows (numerically as well as on a handy pie chart) the statuses of the various trip requests out there. Trip requests awaiting your approval or your estimate show up first and foremost in the top left-hand corner. Below them is the pie chart (which shows only after trip requests have started being submitted), which can be manipulated to show just what you need it to.

- To adjust the time period shown on the chart, click on the drop-down box provided (labeled "Period") and choose what time period you would like to see on the chart (all, today, last week, this week, etc.). Once chosen, the page will refresh and the chart will adjust accordingly.

Back up near the top, just beneath the **Period** drop-down box, you will see a list labeled "**Trips**". This list shows all possible statuses that a trip can hold, along with a number indicating how many trips currently hold that status. Next to each listed status, you will notice a check-box with a green check in it which indicates that the trips that hold that particular status are reflected in the pie chart.

- To remove a status from the list so that trips with that status will not be reflected in the pie chart, click on the green check in the check-box next to that status. The page will refresh and you will see that the status and its color will have been removed from the pie chart and its legend below.

Finally, there are two small sections titled **Active Trips** and **Actual Costs**.

Active Trips shows you the number of trips that are In Progress, Today, and This Week. If there are any to list, you can click on the number to see the trip details.

Actual Costs shows the total amount spent on trips this month and last month.

Trip Statuses:

When approving a trip request that has been submitted, you will assign a **Status** to each request that is routed to go to you, once you look over all the information in the request and make any desired changes or notes. These are the nine statuses that a trip request can receive, depending on what is going on during the trip approval process:

10) **Submitted**: Think of this as a new trip request. This is the status all trips will have when they are entered by a requester through MySchoolBuilding. It can also be used if entered by any other role to ensure proper routing of new trip requests.

11) **Approved**: Indicates that the request has been approved. It may have only passed through one person and may not have met final approval. The approved status has two statuses that aren't seen by the requester. They are "active" and "inactive". "Active" indicates that the request has met with final approval and has been activated as a trip that will occur. "Inactive" shows trips that are still in the approval process.

12) **Pending**: This status can be used to show trips that are in the approval process or waiting for additional information.

13) **Canceled**: This is used when a trip was active at one time and has since been cancelled. It is always a good idea to include the reason the trip was cancelled in the notes field.

14) **Declined**: The requested trip has been declined by the principal or the transportation department. We recommend listing a reason in the notes field.

15) **Duplicated**: This request has already been entered. It's always good to include the Trip ID number for the open trip in the notes field. This will tie the two requests together.

16) **Estimate Requested**: This is used when the requester (or site administrator) would like to get an estimate of what a trip might cost the school. This estimate will then be used to determine if taking the trip will ft in the budget.

17) **Estimate Pending**: Lets the requester know that the request has been received and the estimate is being calculated.

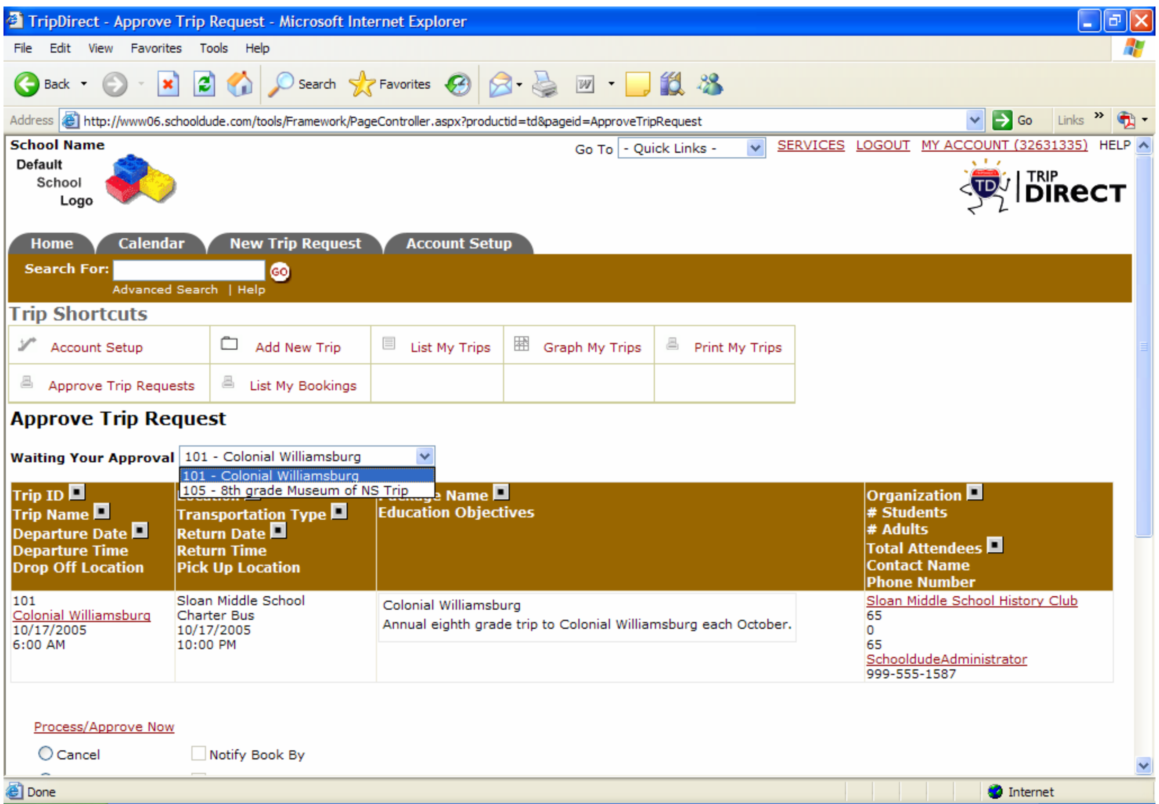
18) **Estimate Complete**: This status indicates the completion of a requested estimate. The requester will be able to view the estimated total by going to "My Requests" in MySchoolBuilding.

2. Approving a Trip

To start approving submitted trip requests, follow these steps:

- Click on the number of requests next to the words "Waiting Your Approval" on your **Home** page. This will take you to the **Approve Trip Request** page.

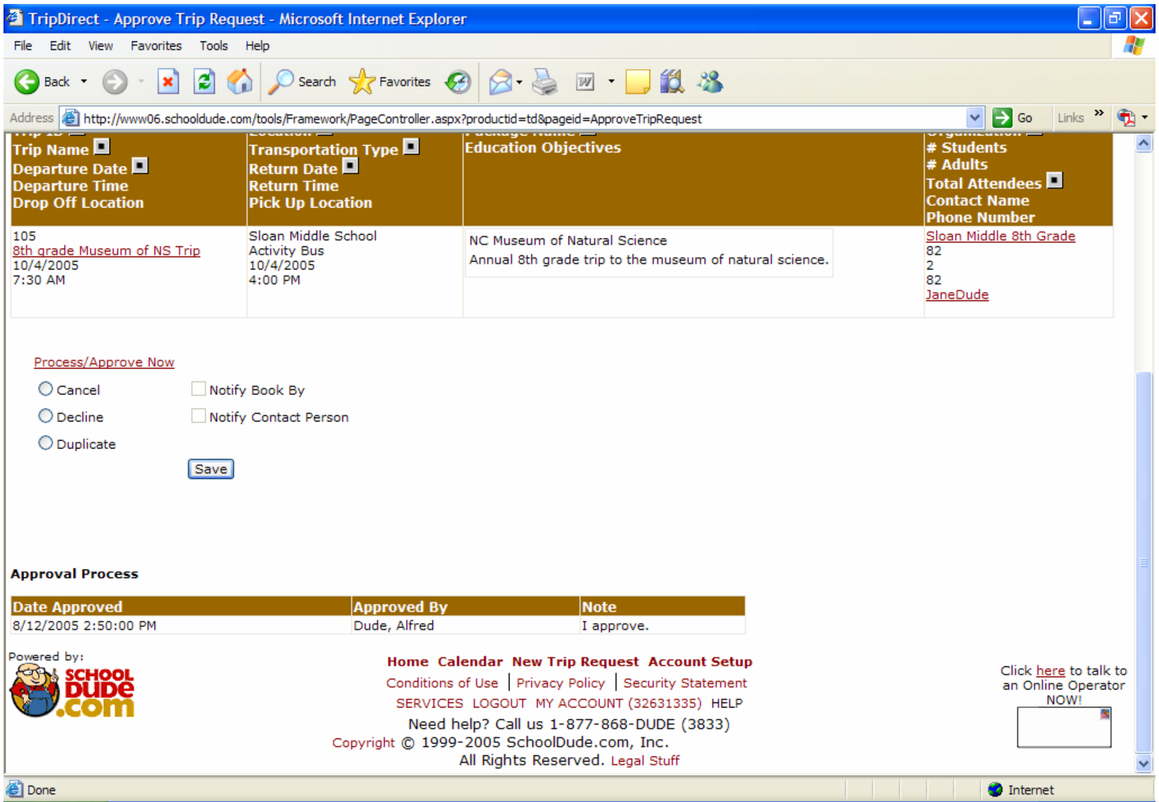
- The Approve Trip Request page shows one trip at a time so choose the first trip you wish to address from the drop-down box next to the words "Waiting Your Approval".



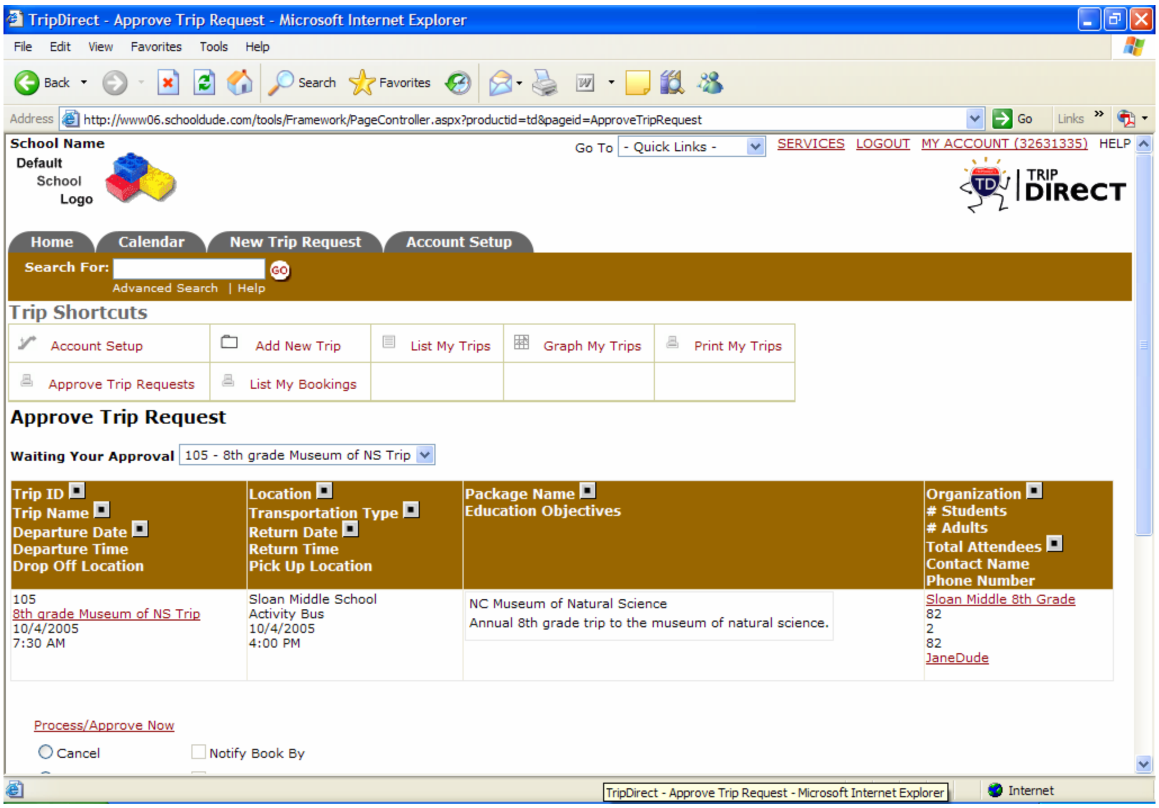
- When the page refreshes, the trip will be listed, along with its basic information, near the bottom of the page.
  You can choose the action you will take on this trip "at a glance" based on the information you see here by clicking in the circle next to the action you wish to take near the bottom of the page and then clicking Save.

- To approve and process a trip request, click on the link (shown in red) that says Process/Approve Now.

If you wish to do anything other than approve a trip (Cancel, Decline, Duplicate), do it here.



- To see the trip's information in more detail and to make any changes before approving a trip, start by clicking on the Name of the trip (shown in red near the bottom of the screen) or the Process/Approve Now link.



- From either of those links, you will be taken to the trip request itself, where you can read over all the trip details. Make any changes you wish to make and note those changes in the **Approval Note** field near the bottom of the page. You can choose vendors, drivers, and vehicles on this page, as well as enter any related costs.

- To approve the trip request, click the check box next to the word "**Approve?**".

- You can choose to route the trip request on to someone else by choosing their name from the Route to Next drop-down box. Leave the box blank if you want to allow the system to route the request for you based on information already defined in the routing setup.

- When the screen refreshes, you will see the date and time of your approval listed next to the words "**Approval Process**". Your approval has been saved.

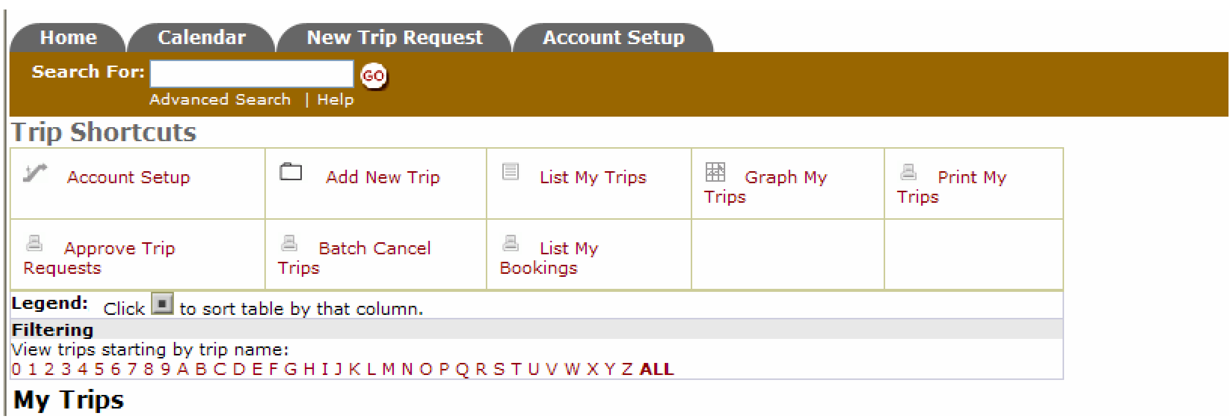
- Click on any of the links in red at the bottom of the screen to proceed to where you'd like to go next. Changes will reflect in the information shown on your **Home** page.

V. Reports: Listing, Graphing, and Printing Your Trips

SchoolDude provides you with the option of listing, graphing, and printing any and all of your trips, along with their information for your convenience and for your records. Follow these steps and you'll have hard copies and visual aids for all of your trip information at your fingertips.

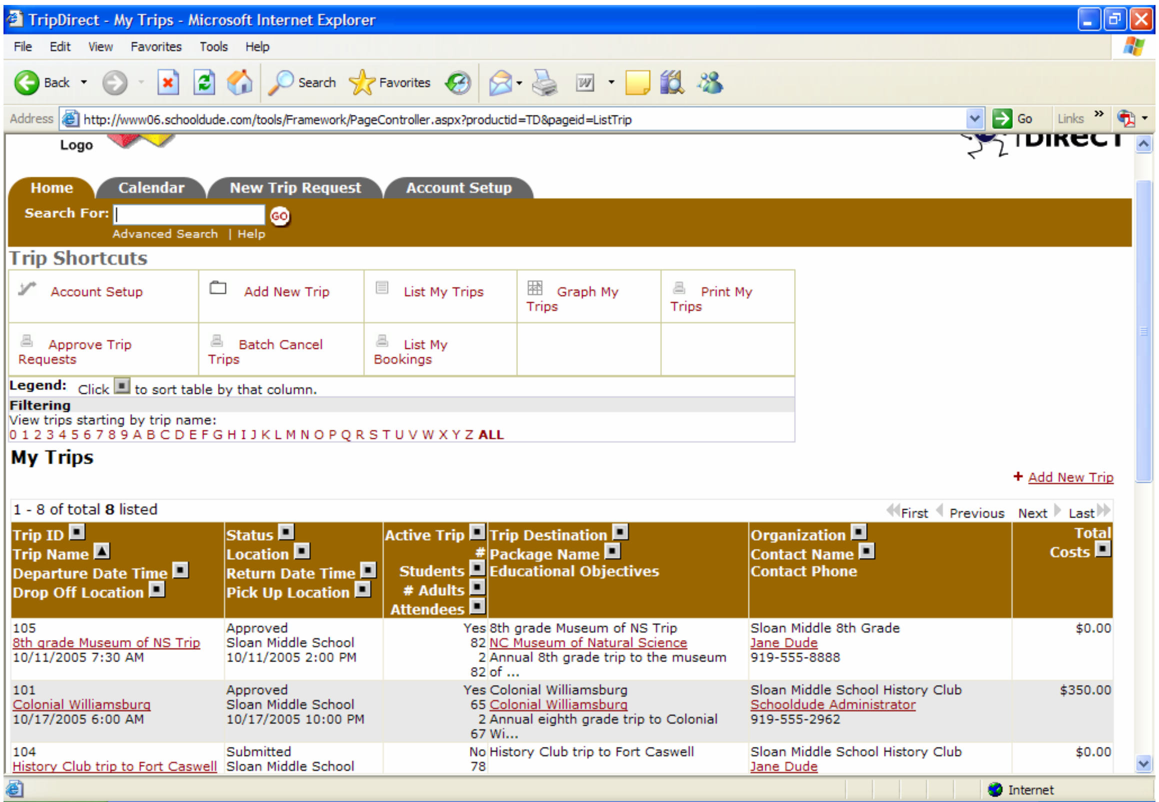
Listing:

4. From your Home page, click on any of the numbers listed for trips that have been entered into TripDirect, no matter what the status.
5. You will be taken to the Approve Request page or a version of the My Trips page, depending on the link you click, which will show the information indicated by the number you clicked on. This could be trips waiting to be approved, pending trips, trips that have been declined, etc.
6. At the top of this page, you will see the shortcuts listed along the top. They will look like this:



To list your trip information, do the following:

- Click on the List My Trips shortcut.
- You will be taken to the **My Trips** page, which will look something like this:

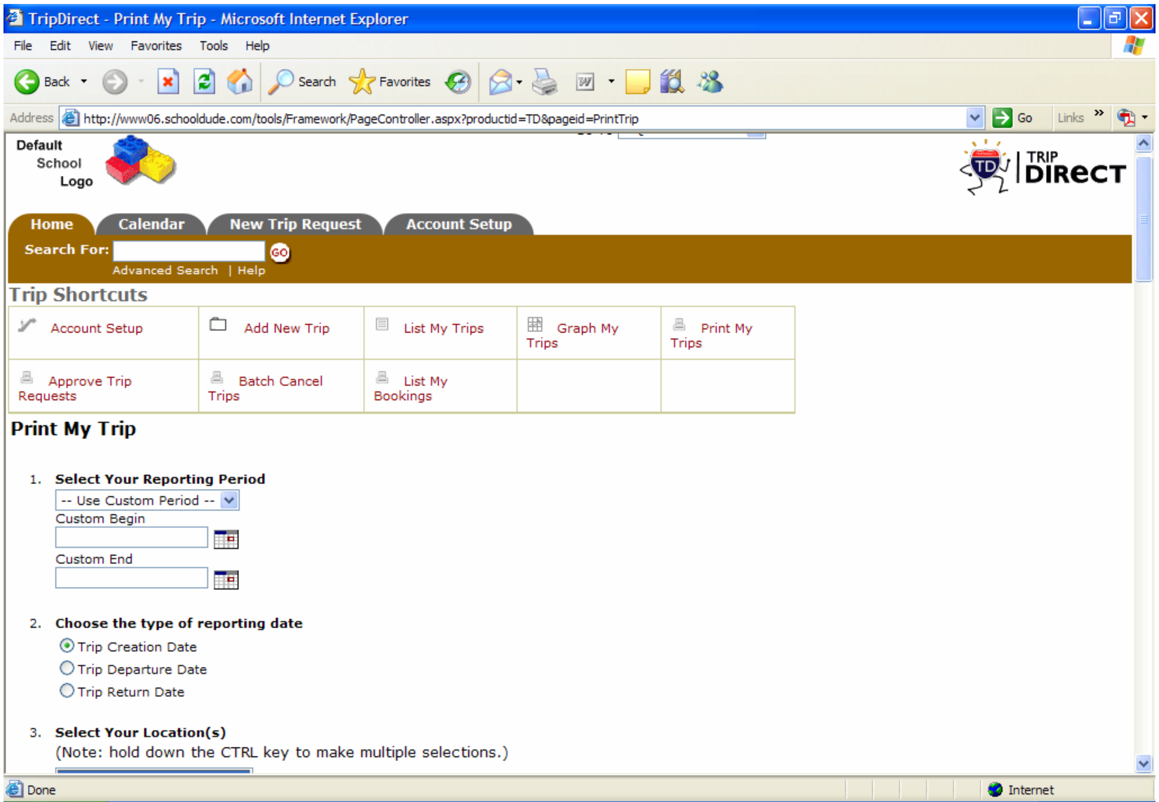


You will see information listed for all trips in the TripDirect system. View trip details by clicking on the Trip Name, Package Name, Destination, and Contact links, shown in red.

To view only trips that you have requested/booked, click on the List My Bookings shortcut at the top of the My Trips page. This will list only trips requested by you.

Printing:

- Click on the Print My Trips shortcut.
- You will be taken to the Print My Trip page, which will look like this:



- Select the date(s) of the trip or trips you wish to print, choosing a time frame from the drop-down box provided or entering a Custom Period. To do this, simply leave Use Custom Period in the drop-down box and enter the Custom Begin and End dates in the two boxes provided below.
- Choose the type of reporting date that you would like to view for printing. In other words, would you like to pull trips based on creation date, departure date, or return date?
- Choose the Location that the desired trip is or was for. In other words, who is taking or who took the trip? What location were they from?
- Choose the name of the Organization that went on the trip.
- Select the Trip Name from the list provided.
- Select the name of the Driver for that trip.
- Select Vehicle(s) used.
- Select Vendor(s) used for this trip.
- Select the Status that the trip currently holds.
- Select any Budget used.

- Choose trip with Package: What this means is that you can indicate here whether or not the trip you wish to print is part of a Trip Package.
- Indicate the “active” status of the trip or trips you wish to view by clicking Yes, No, or Both.
- To select the Trip ID range, enter the Trip ID numbers in the range that you would like to print (in other words, “from this trip to this trip”).
- Choose what Type of report you would like to view for printing—either Summary or Detail.
- Choose your report format: PDF or Excel spreadsheet.
- Click Print This! and you’re done!

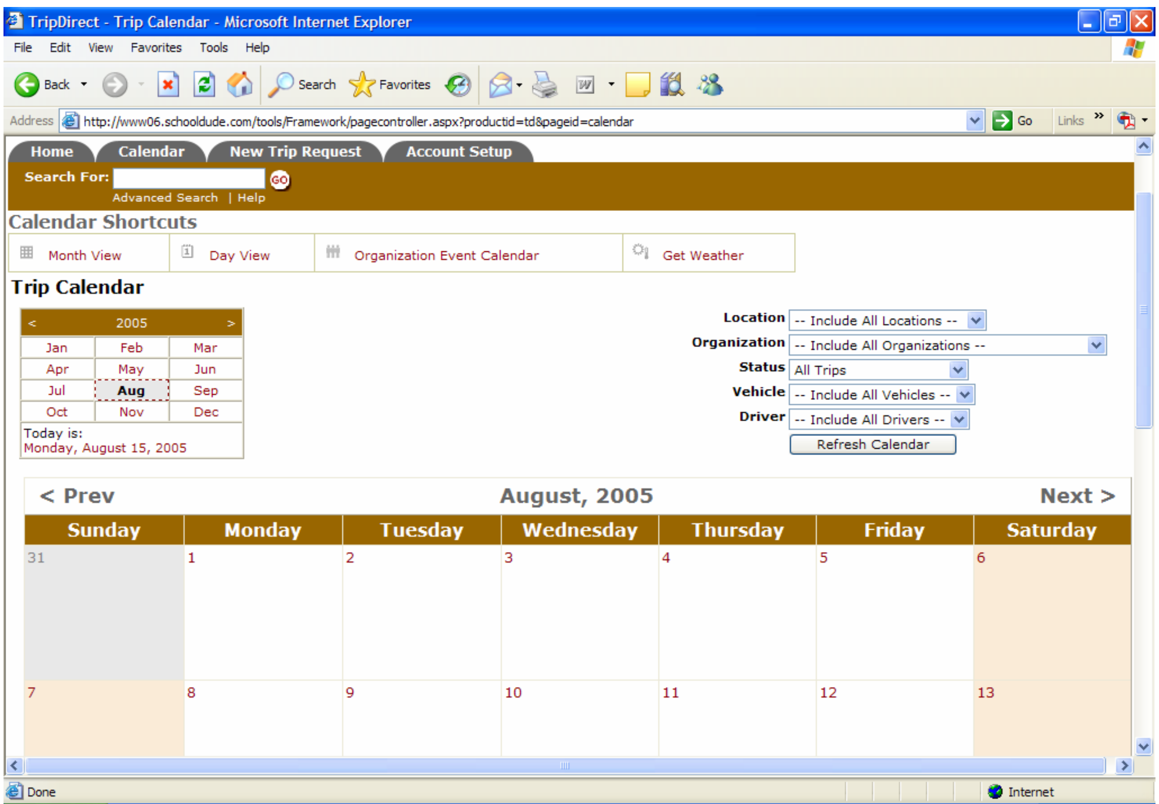
Graphing: Coming Soon!

VI. Using the Calendar: See the Big Picture.

As with all SchoolDude products, TripDirect has a **Calendar** tab—a place you can go to see what's going on, where, when, and who's involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we'll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the Calendar tab at the top of your screen.

The page that opens up will look like this:

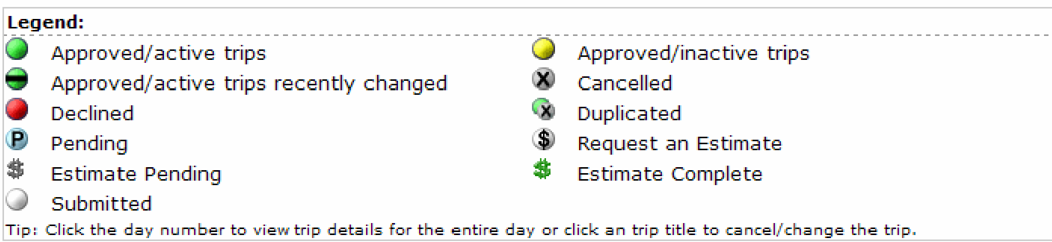


At the top of your screen, just above the words "**Trip Calendar**", are the **Calendar Shortcuts**: Month View, Day View, Organization Event Calendar, and Get Weather.

1. The **Month View** page shows you what's going on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The month you're currently in will display with arrows in the top left and right-hand corners that you can click on to navigate to **Previous** months or months coming **Next**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the **Prev** and **Next** buttons.

On the Month View, each day shows in the traditional squares of a calendar, which contain any activity that may be going on: Trip Name and Number, along with a colored dot or symbol, which indicates that trip's status. The calendar legend is located near the bottom of the Month and Day View pages and looks like this:



- To obtain detailed information about a trip showing up on your calendar, simply click on the Name of that trip (shown in red) and you will be taken to the **Trip Request** page, containing all information recorded for that particular trip.

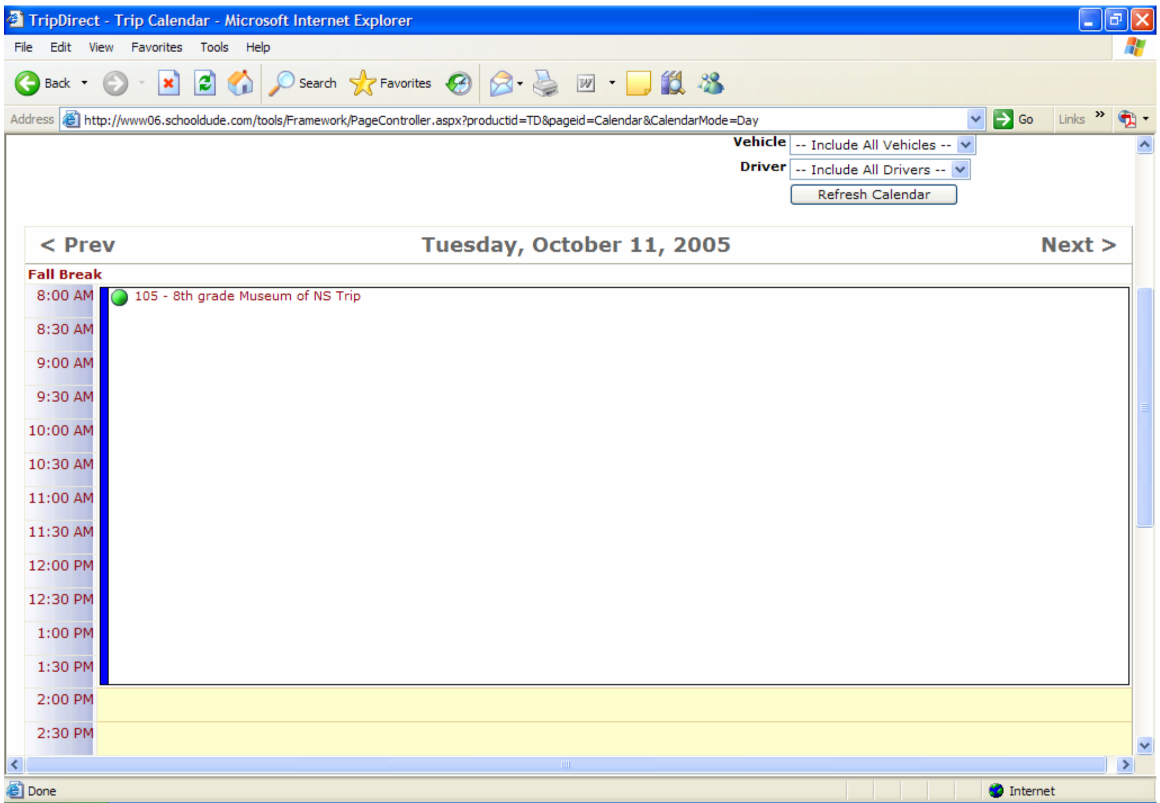
Just below the Shortcuts, on the right-hand side of the page, you will see a series of drop-down boxes. What these allow you to do is sort your current month's calendar based on **Location**, **Organization**, **Status**, **Vehicle**, or **Driver**. Choosing one of these and then clicking the Refresh Calendar button will show only trips fitting into that particular category.

To get a report on the weather, click on the Weather Icon, which appears on the calendar on today's date. You'll be taken to AccuWeather.com, which will pop up in a separate window.

2. The **Day View** page can be reached in two ways:

- Clicking on the Day View shortcut at the top of the page, or
- Clicking on the number of the date on the monthly calendar.

The Day View shows you what's going on, one day at a time, in half-hour increments. For example, if you have one trip on a particular day leaving at seven-thirty in the morning and returning at two, all 30-minute slots will be covered by that one trip between the hours of seven-thirty and two. See Below:



Note that only the hours of 8:00 a.m. to 5:30 p.m. will show on the Day View of the calendar. Trips occurring or extending after that amount of time will not be shown.

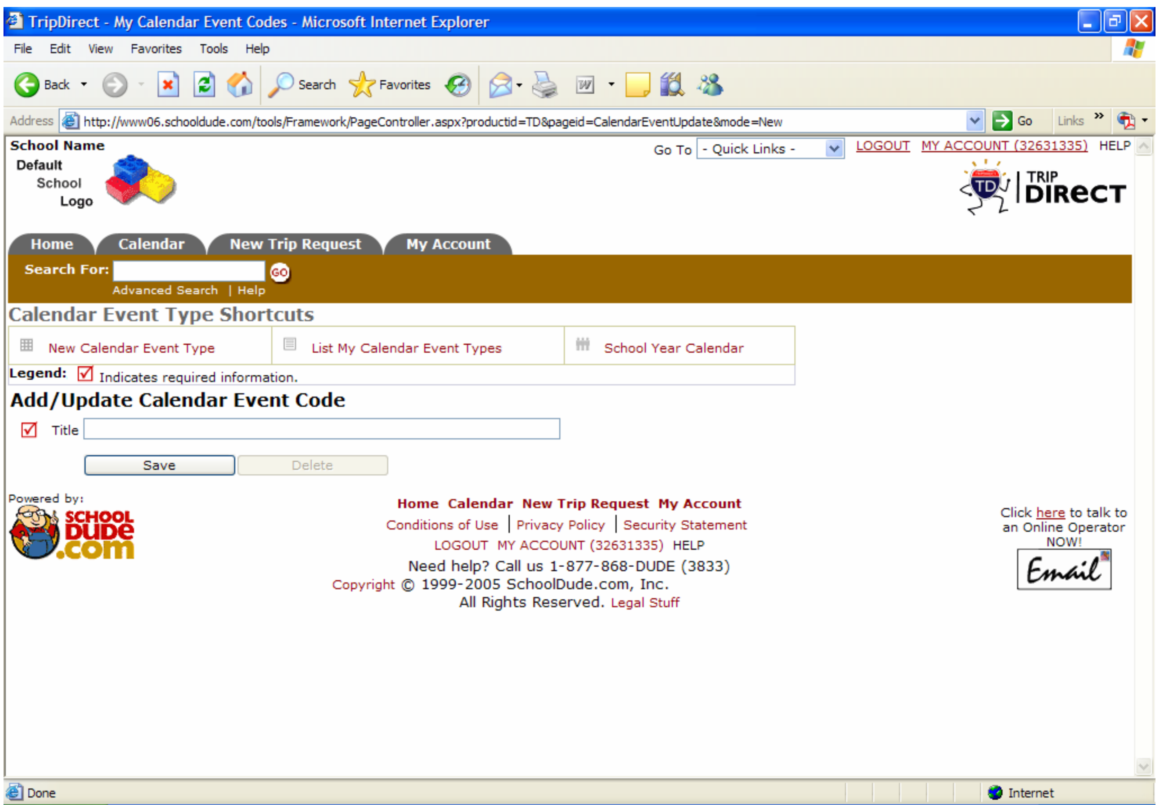
As with the Monthly View, you can navigate your **Day View** calendar by using the Prev and Next buttons in the top corners of the Day.

3. The **Organization Event Calendar** page is where you can enter events, such as school breaks, for organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and listed in more detail on the right-hand side.

To enter an event into the **Organization Event Calendar**, you'll need to start by creating an **Event Title** for that event and proceeding from there:

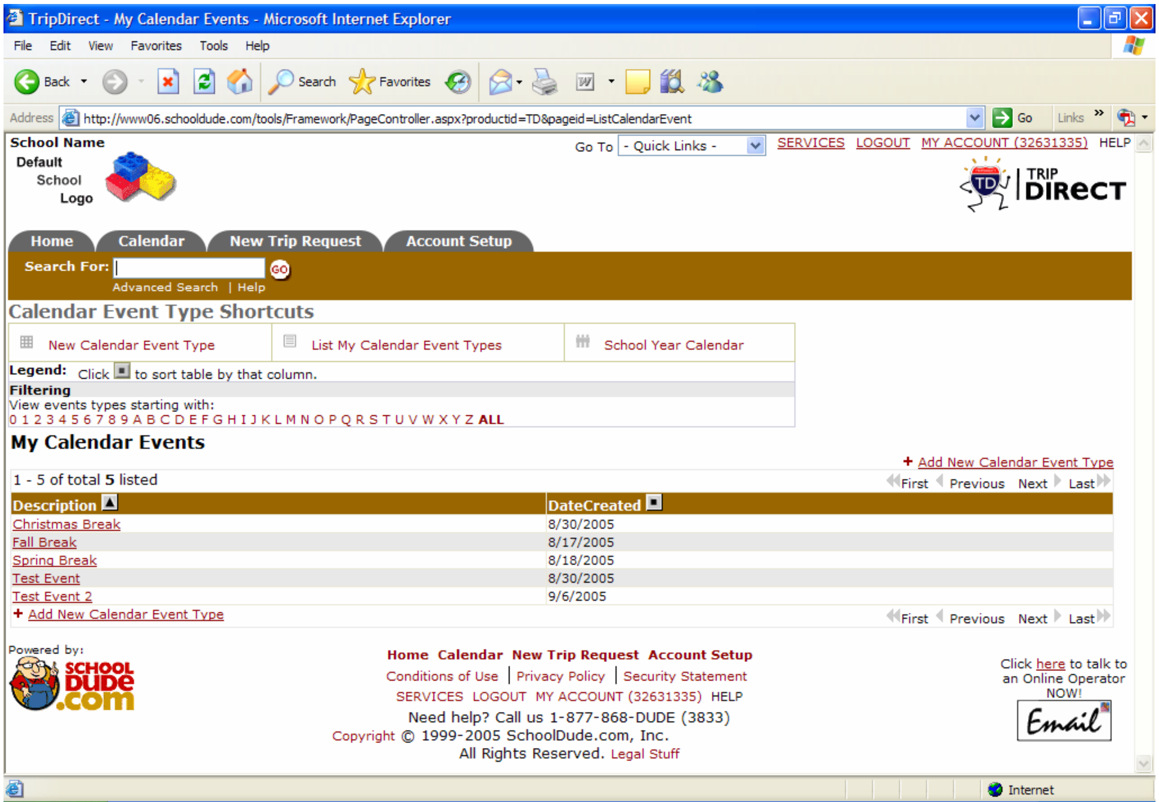
- To enter your **Event Title**, click on the Event Title link (shown in red above the Select Event Title drop-down box).

- Clicking on the Event Title link will take you to a new page titled **Add/Update Event Code**. In the box provided next to the word Title, enter the title of the event. See below:



- Click Save.

- You will then be taken to the **My Calendar Events** page where all events you enter will be listed and where you can edit or delete events by clicking on that event's Title. Below is a view of the My Calendar Events page, once several events have been added:



- Return to the **Organization Event Calendar** page by clicking on the Organization Event Calendar shortcut near the top of the page.

To continue with the next steps of adding an event to the Organization Event Calendar after creating all of your event titles, follow the steps below:

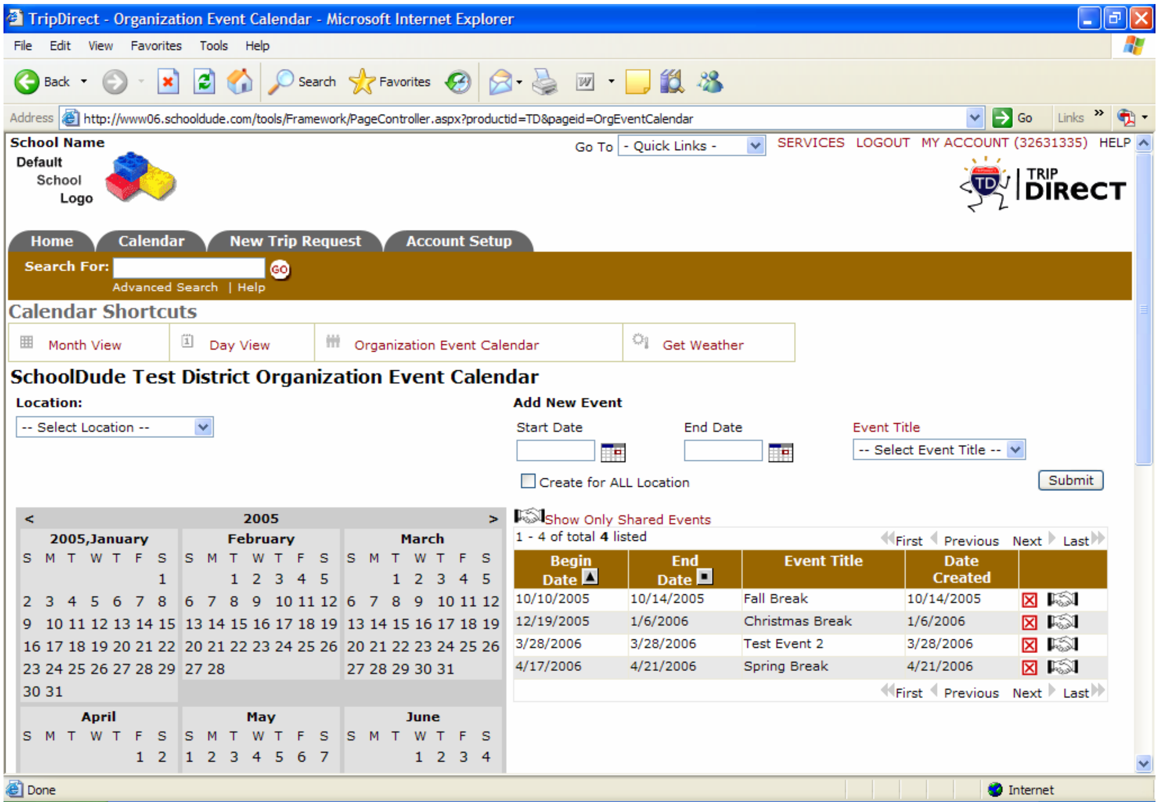
- Back on the **Organization Event Calendar** page, choose a Location for the event from the drop-down box provided. If using "All Locations", click on the check-box marked **Create For ALL Locations** directly below the date fields.

- Select a Start Date and End Date for the event.

- Select the Event Title.

- Click Submit.

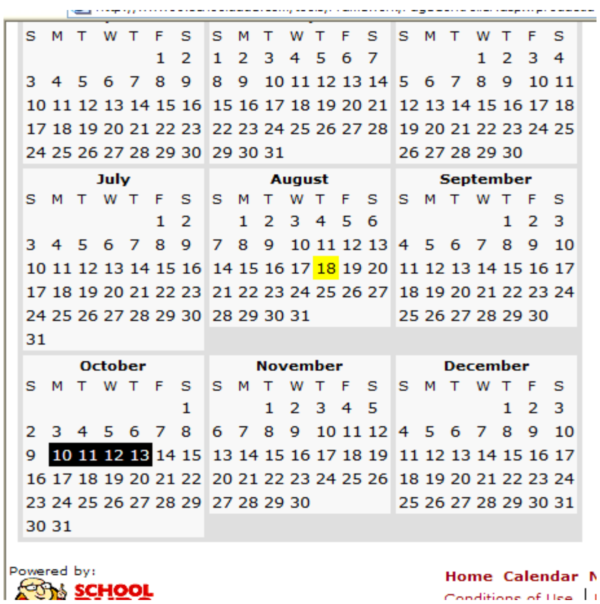
When the page refreshes, your event will be listed on the Organization Event Calendar page, to the left of the yearly calendar. See below:



A Few More Things About the Calendar:

When you enter an event into the Organization Event Calendar, that event's date or dates will show as highlighted in black on the yearly event calendar on the left-hand side of the page.

Below is an example which shows that Fall Break will be from October 10-14. Its dates have been highlighted in black on the calendar.



- To delete an Event entered onto the list and the calendar on the **Organization Events Calendar** page, simply find that item on the list and click the ☒ on the right-hand side, next to the event you wish to delete (see below).

- To show only "Shared" events, that is, events shared by all Locations, click on the Show Only Shared Events link (shown in red) next to the clasped hands icon. This link is located above the list of events (see below).

4. The **Get Weather** shortcut, as with the weather icon on the main monthly Calendar, serves as a link to connect you with **AccuWeather.com** where you can check current weather conditions in your area or the area of your trip destination. You can also check the forecast with a range up to fifteen days.

- Simply click on the Get Weather shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.

Requester Guidelines

I. Welcome to TripDirect! Now What?
(A Word On How to Get Started)

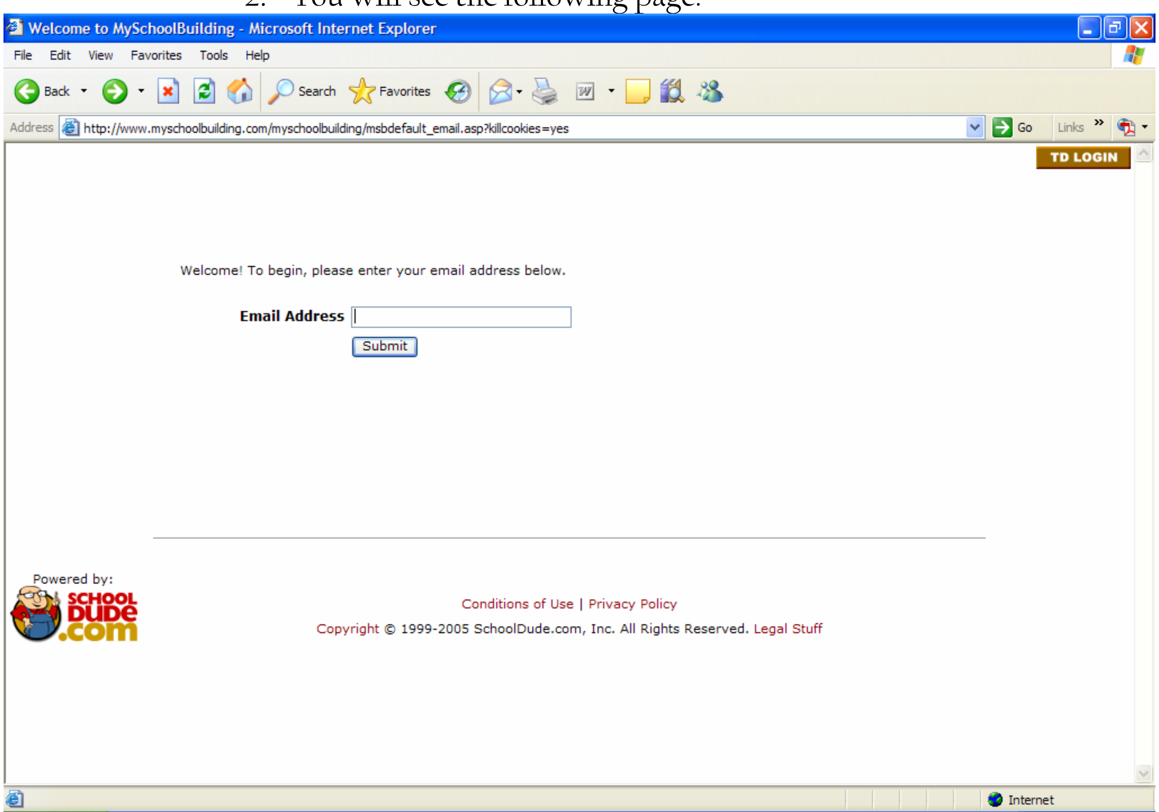
MySchoolBuilding.com is where you, as a Requester, will go to make all of your new trip requests. There are two ways that a Requester can be entered into the system:

- The TripDirect Administrator can add the Requester into the system.
- The Requester can add themselves into the system.

If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

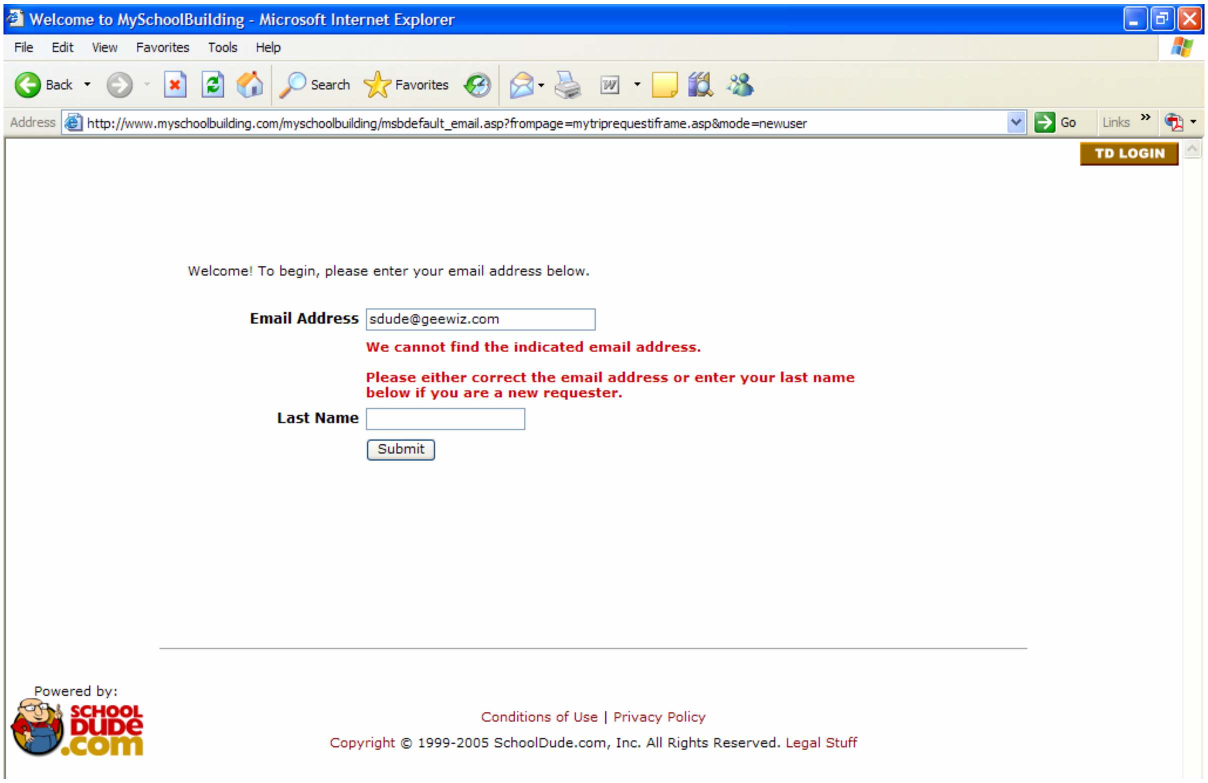
1. Go to www.myschoolbuilding.com.

2. You will see the following page:



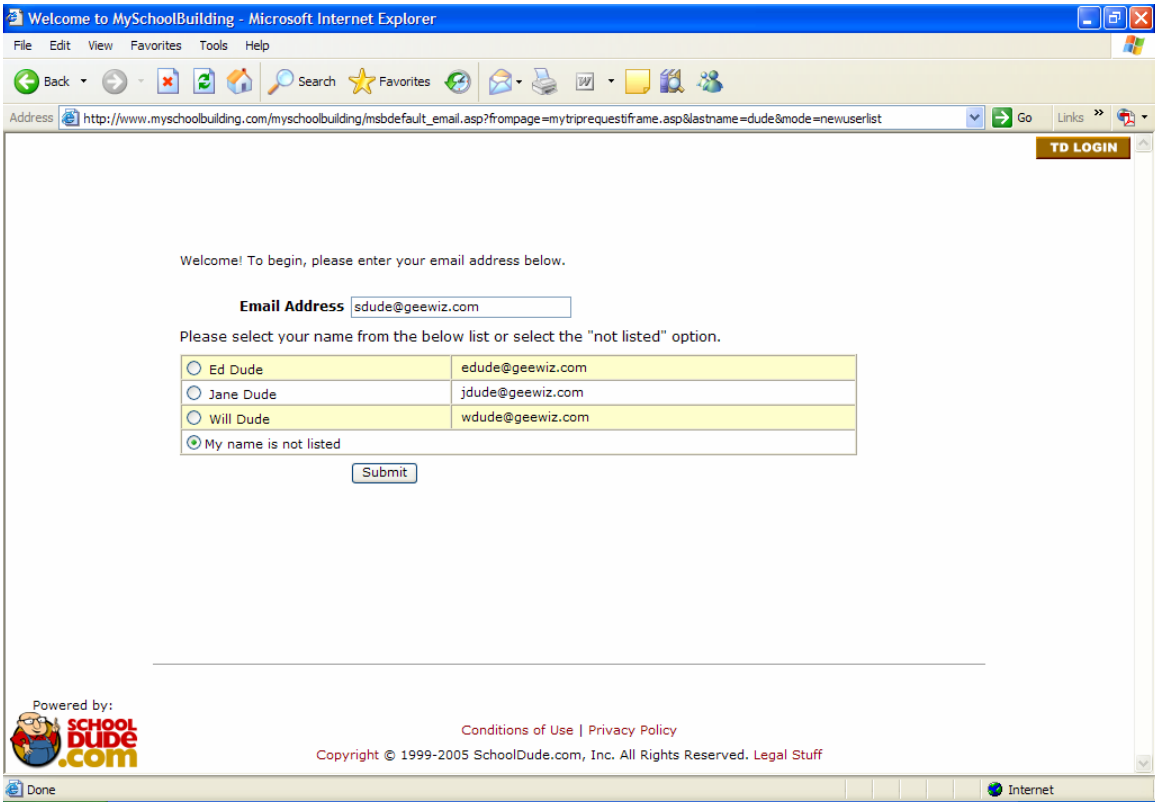
3. Enter your email address in the space provided. Click Submit.

4. As you are a new Requester, you will then see the following page:



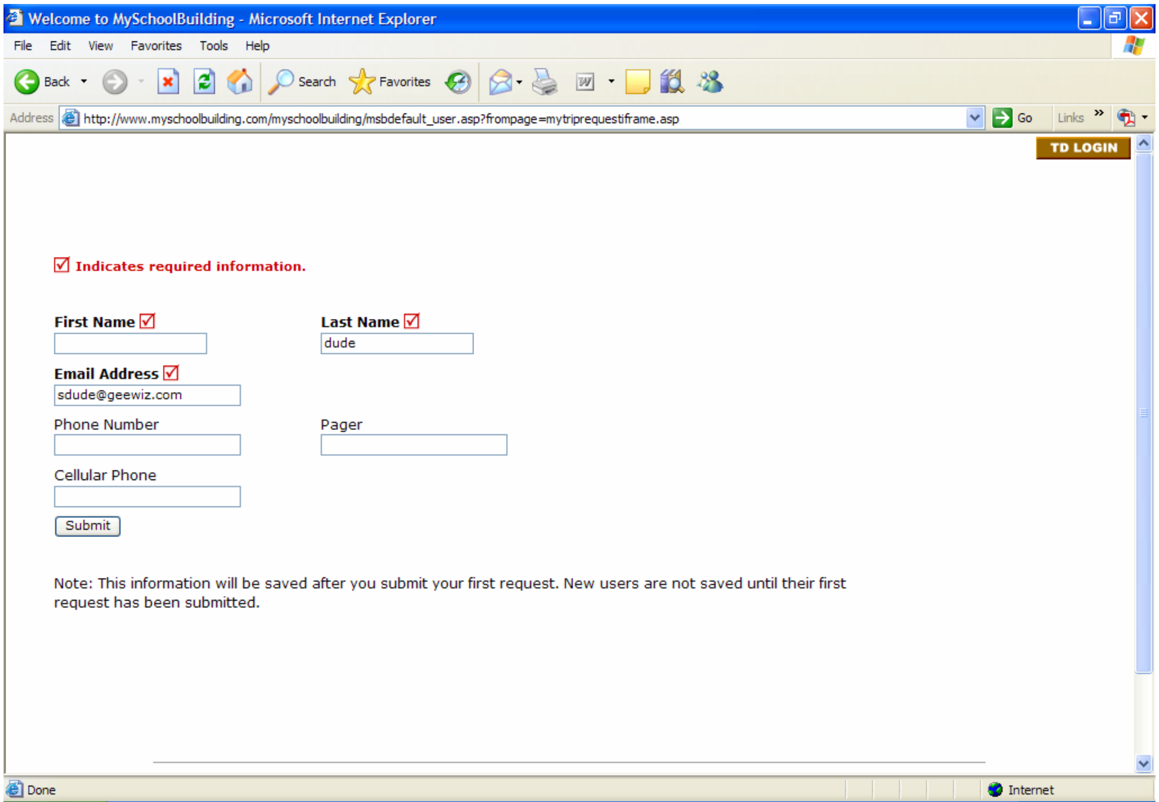
5. Enter your last name into the box provided. Click Submit.

6. Next, you will be taken to the page below:



Your email address should already be entered into the box provided. If it's not correct, however, enter it correctly. Make sure that the circle next to "My name is not listed" has been clicked and contains a green dot. Click Submit.

7. The next page you will be taken to will look something like this:

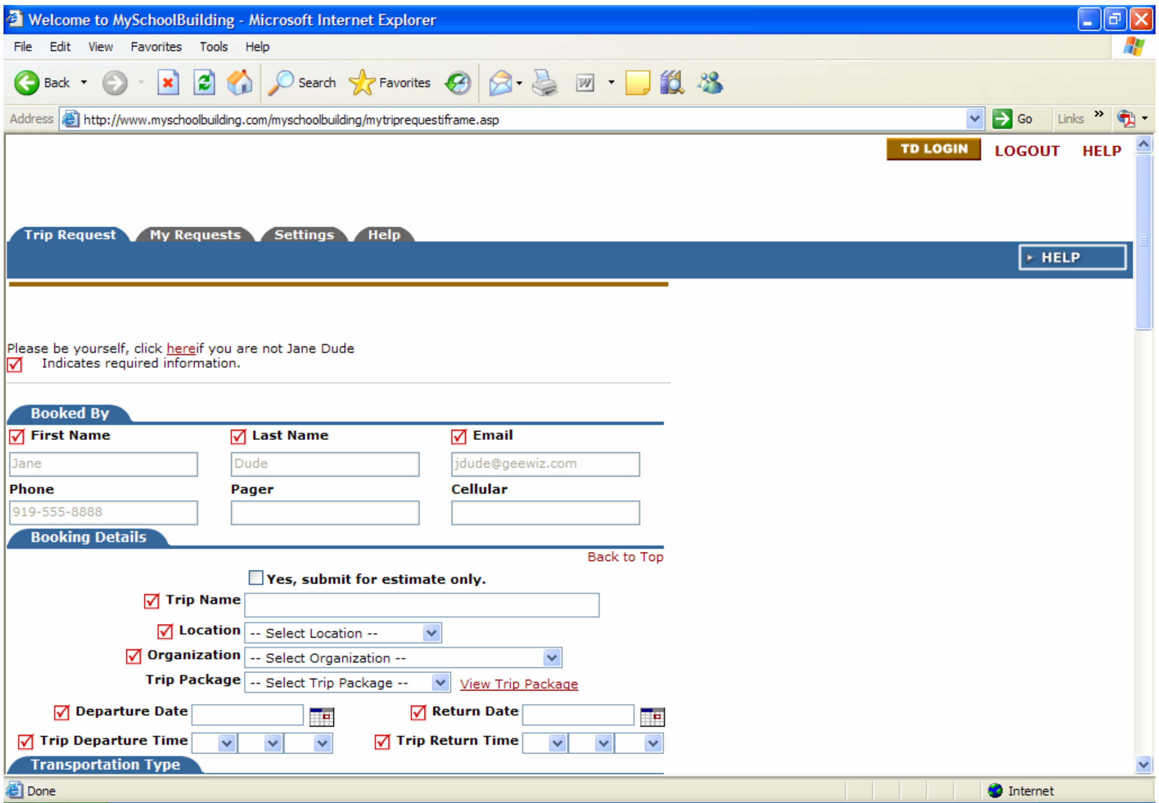


Enter the required information (marked with a ☑) and click Submit.

8. You should then be taken to the point where all Requesters start once they are in the system: the **Trip Request** page. Welcome aboard!

You Are Here…

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the **Trip Request** page. It should look something like this:



Across the top of the page, you'll notice four tabs labeled **Trip Request** (you are here), **My Requests**, **Settings**, and **Help**. These tabs are how you navigate to the information that you need. In the following sections, each tab will be explained. You'll see what they contain and how to use them.

II. The Settings Page

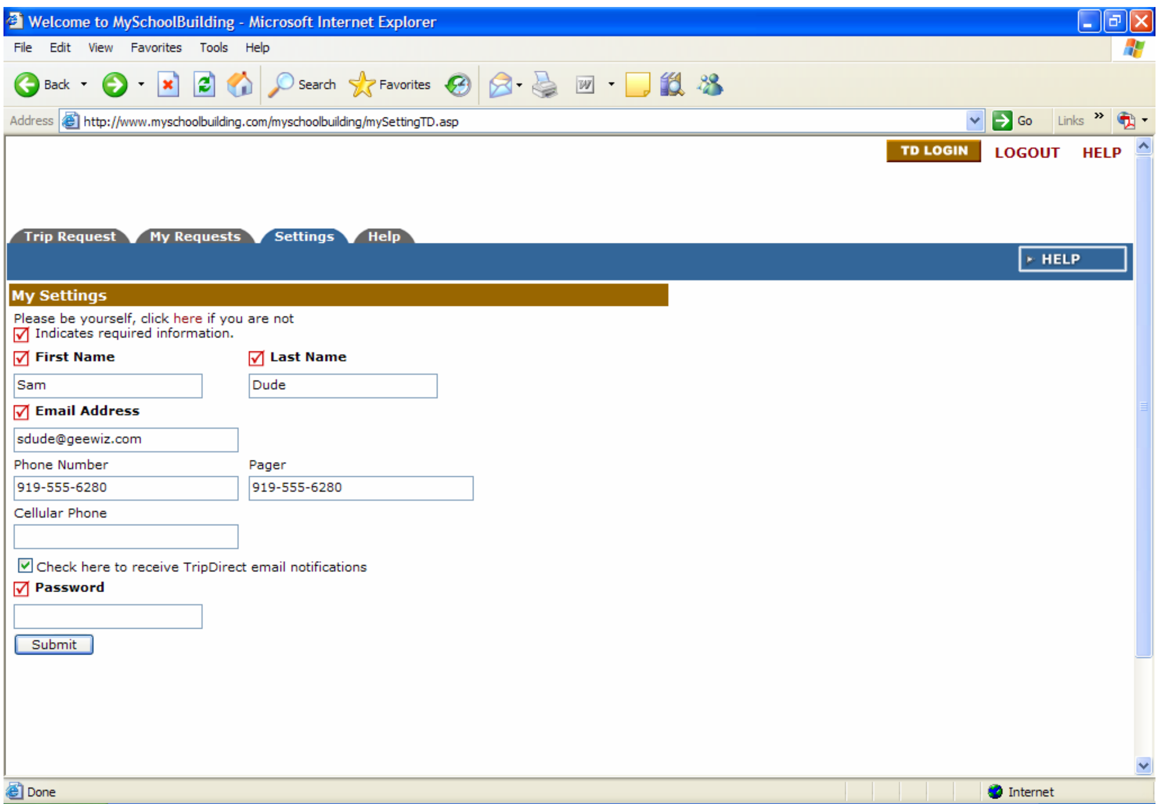
Before we get started making trip requests, lets take a moment to check out the **Settings** page, which contains your information as entered by the Adminstrator during the Account Setup process (if you set up your own account, this page will show the information you entered).

- Make any changes you wish to make, enter your password at the bottom, and click Submit.

OR

- To continue without making any changes, simply click the Back button at the top of your page or click the Tab of the page you wish to go to next.

If you have made changes, the page will refresh to bring up the same screen only now, the words "My Settings Saved" will appear in red at the top of the page. Proceed by clicking the Tab of the page you wish to go to near the top of the screen.



III. The Trip Request Page: What It Contains and How to Use It.

The **Trip Request** page is where you will fill out and submit your trip request forms. Once submitted, your request form will proceed on to the next person it has been routed to by the Administrator during the Account Setup process. This could be the Administrator him/herself, who can not only approve but also activate a trip request (the Administrator is the only person who can "activate" a trip request). Or it could first go to one, or a series of, Site Administrators who will then decide whether or not to approve your request. Based on their answer, your request will proceed on down the path routed for it until it is assigned its final status.

These are the nine statuses that a trip request can receive along the way, depending on what is going on during the trip approval process:

19) **Submitted**: Think of this as a new trip request. This is the status all trips will have when they are entered by a requester through MySchoolBuilding. It can also be used if entered by any other role to ensure proper routing of new trip requests.

20) **Approved**: Indicates that the request has been approved. It may have only passed through one person and may not have met final approval. The approved status has two statuses that aren't seen by the requester. They are "active" and "inactive". "Active" indicates that the request has met with final approval and has been activated as a trip that will occur. "Inactive" shows trips that are still in the approval process.

21) **Pending**: This status can be used to show trips that are in the approval process or waiting for additional information.

22) **Canceled**: This is used when a trip was active at one time and has since been cancelled. It is always a good idea to include the reason the trip was cancelled in the notes field.

23) **Declined**: The requested trip has been declined by the principal or the transportation department. We recommend listing a reason in the notes field.

24) **Duplicated**: This request has already been entered. It's always good to include the Trip ID number for the open trip in the notes field. This will tie the two requests together.

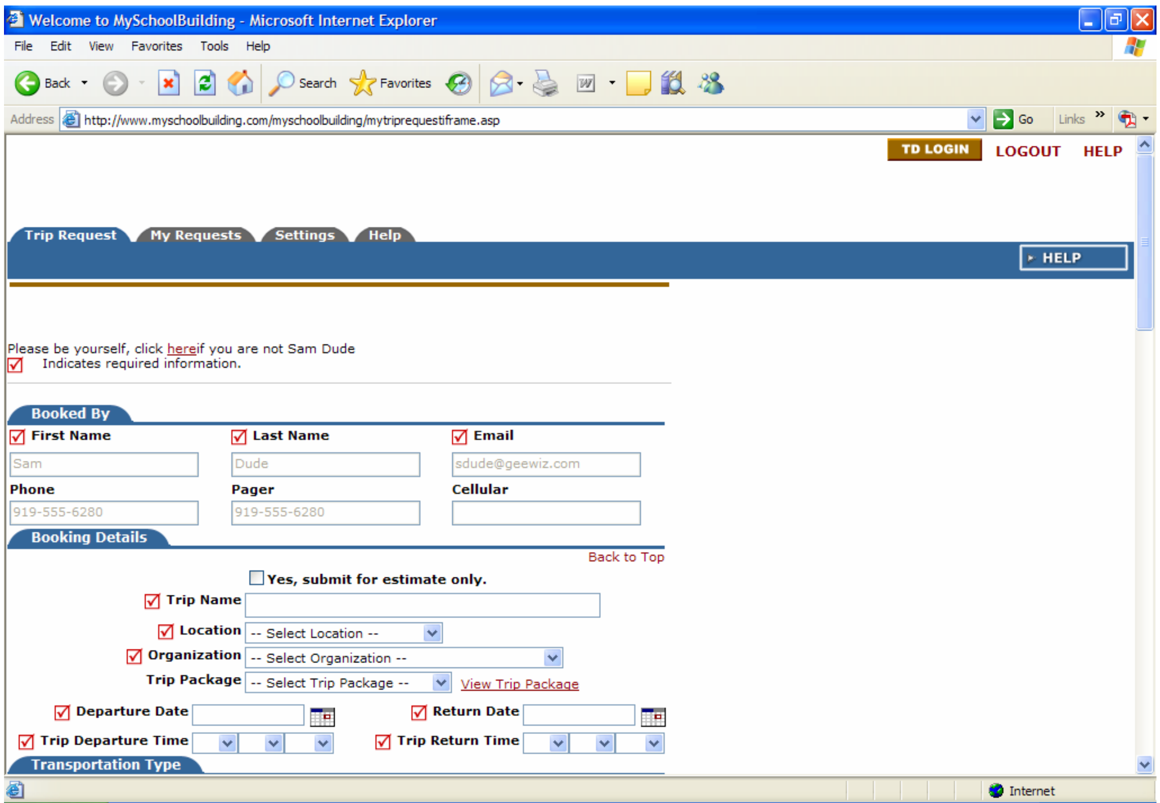
25) **Estimate Requested**: This is used when the requester (or site administrator) would like to get an estimate of what a trip might cost the school. This estimate will then be used to determine if taking the trip will ft in the budget.

26) **Estimate Pending**: Lets the requester know that the request has been received and the estimate is being calculated.

27) **Estimate Complete**: This status indicates the completion of a requested estimate. The requester will be able to view the estimated total by going to “My Requests” in MySchoolBuilding.

Making A Trip Request:

Ready to get started? This is where the trip-planning process starts—with a submitted trip request. Below is a shot of what your **Trip Request** page should look like:



In this section of your manual, we'll walk you through the trip request process so that you can get started making trip requests with both hands on the wheel!

To request a New Trip, follow the steps below, keeping in mind that ☑ **indicates a required field:**

- Booked By: You'll notice that, as you are logged in as the Administrator, all of your information will already be entered into the fields of "First Name", "Last Name", "Email", and any further contact information that you entered in **Account Setup**.

- Booking Details: This section is full of drop-down boxes for your convenience. Start by filling out the required information: **Trip Status**, Location (what school or location the trip will be taken from), Organization (what group is taking the trip?), and Departure and Return dates and times.

Continue by filling in what remaining information you have that you would like to include: **Driver departure and return time** (what time the driver will start and end his shift that day), **Drop Off and Pick Up times** (what time the parents should drop off and then pick up their children), **Destination Arrival and Departure dates and times** (when those on the trip will arrive and depart their destination), **Driver's Start and End Locations**, **Drop Off and Pick Up Locations**, and the **Estimated Mileage** of the trip.

- Transportation Types: In this section, simply click on the icon for the type of transportation that will be used on this trip.

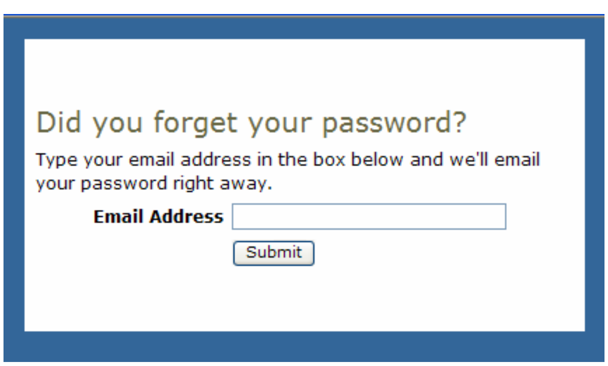
- Trip Contact: If the "Booked By" information is the same as the "Trip Contact" information, you'll save a little time by clicking the box at the top of this section.
  If not, fill in the **First Name**, **Last Name**, and **Email Address** of the Trip Contact, as well as any other contact information you may have (telephone, pager, and cell phone numbers).

- Attendees: Who will be going on this trip? In this section, you will need to fill in the **names of any faculty attending** the trip, as well as the **number of students attending**. Any further information (**names of supervising adults, number of adults and total attendees, cost of adults and students**) should be entered here as well.

- Notes: This is where you can make note of any special needs or requirements for the trip.

- Security: Once you've filled in all the necessary information on your trip, you'll need to enter your password here and click Submit Request.

  **Note: If you've forgotten your password, click on the Forgot Password? link provided and a box asking for your email address will pop up. Type your email address in the space provided, click Submit, and your password will be sent to your email inbox.



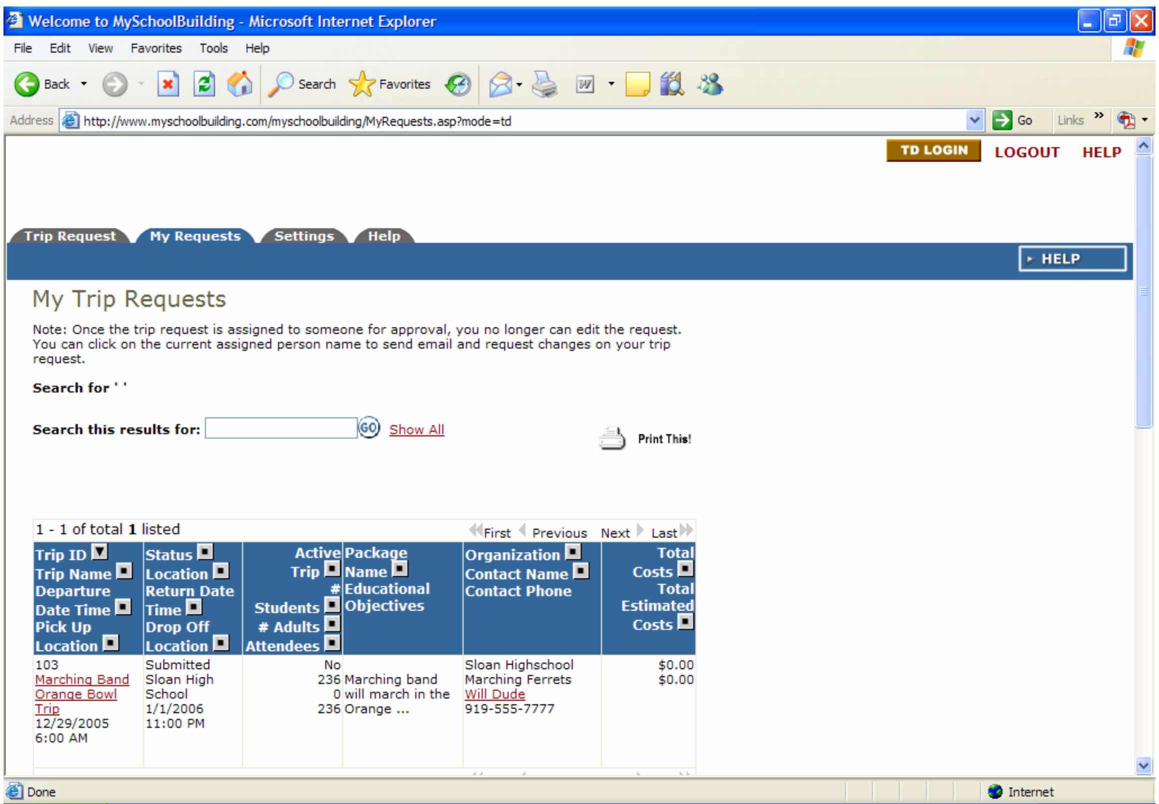
To continue, move on to the next (My Requests) section of your manual.

IV. My Requests: Keep Track of Your Requests.

Once you click Submit Request, you will be taken to the **My Trip Requests** page, where you'll see your trip listed. As you submit more trip requests, they will be added to the list on this page. The trip name will be highlighted in red and serves as a link that you can click on at any time to view your trip request.

(Keep in mind, however, that you will **NOT** be able to make any changes to a trip request once it has been approved, even if it hasn't been activated by the Administrator yet.)

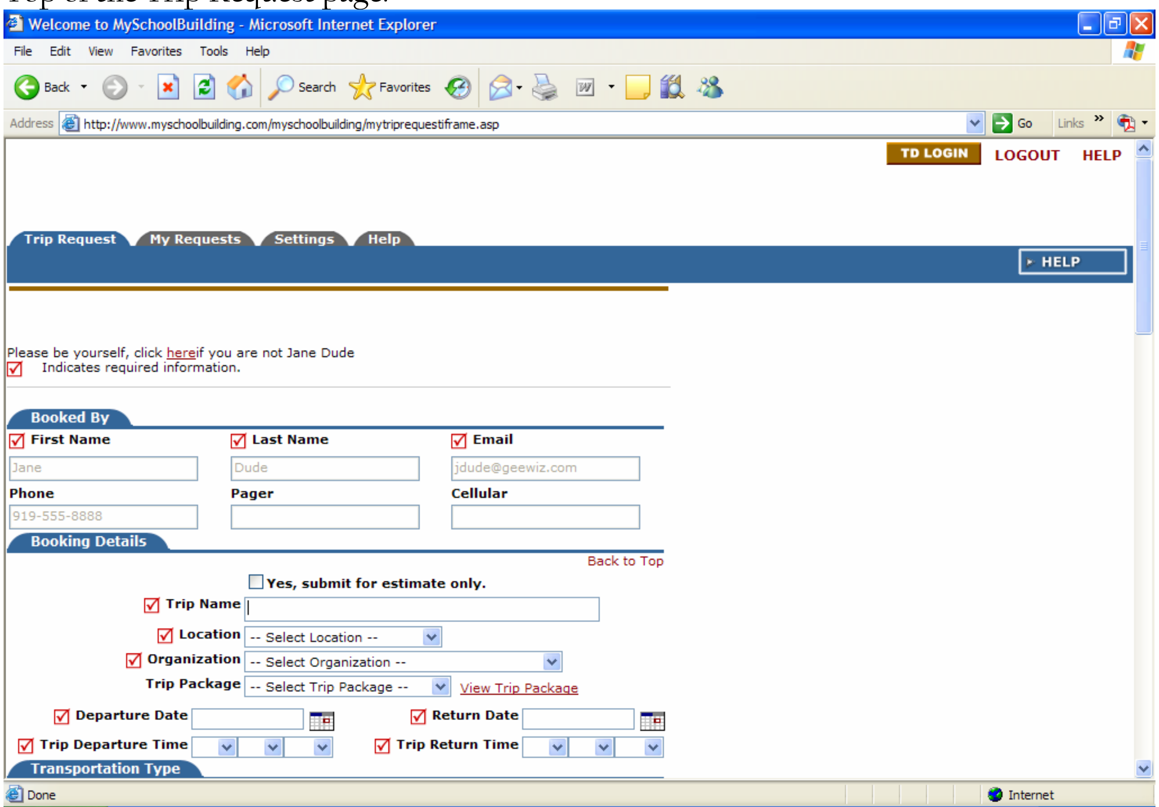
Below is a view of the **My Trip Requests** page with a trip already listed as an example:



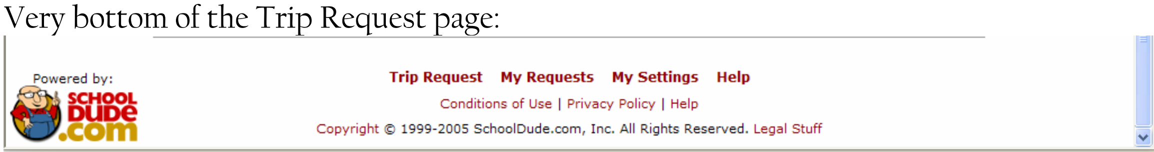
V. Help: Find Answers to Your Questions.

There are five links you can use to access the Help page. Click on any of these links and you will be taken to this manual at any time.
One link is a tab located near the top of your page with all the other page tabs. Another is in the top-most right-hand corner of your page. There is another, also on the right-hand side of the page near the top. The remaining two are located at the bottom of the page. See below:

Top of the Trip Request page:



Very bottom of the Trip Request page:

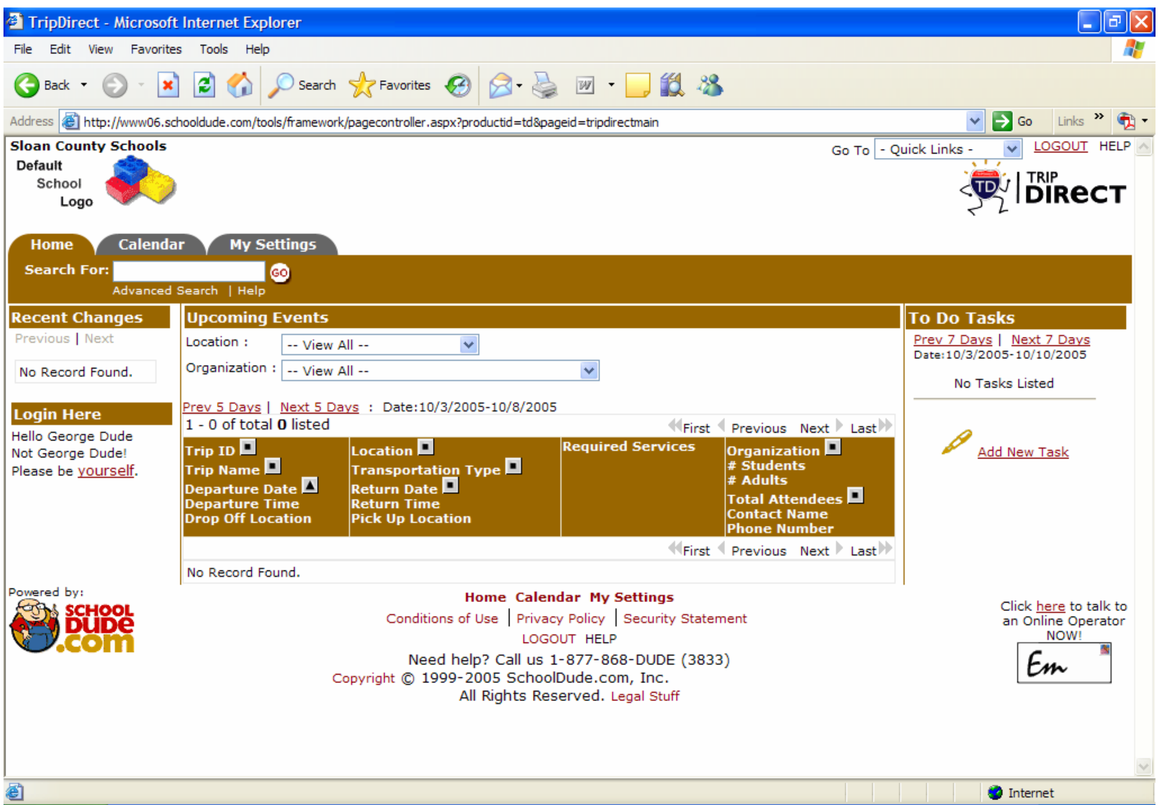


Service Provider Guidelines

I. Welcome to TripDirect! Now What?

(A Quick Overview of the Home Page)

Once you've logged in with your user name and password, you're taken directly to your **Home** page, which should look something like this:



Your **Home** page has several components. Across the top of the page, there are three tabs reading: **Home**, **Calendar,** and **My Settings**. Currently, you are looking at the **Home** page which contains the following:

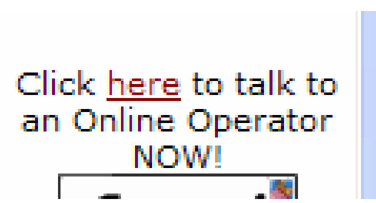
8. **Login Here** shows who you're logged in as. Here, you can log in as yourself if you are logged in incorrectly.

9. **Recent Changes** shows you any changes made in a time period which the administrator will specify as "recent" during the Account Setup process. This could be a number of hours or a number of days.

10. **Upcoming Events** tells you of any trips within the next week, along with trip-related details such as departure and return times, total number of students attending, name of organization taking the trip, etc. Upcoming Events can be sorted by Location or Organization by choosing which one you wish to see from the drop-down boxes provided.

11. **To Do Tasks** lets you know of any maintenance, food, or IT services that will be needed for trips occurring during the next week. This section will act as a reminder to you as to what needs to be done in the week to come.

12. HELP links are available in both the top corner and the middle right-hand edge of your **Home** page. Clicking on the Help link in the top right-hand corner will take you to the TripDirect product manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude Support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:

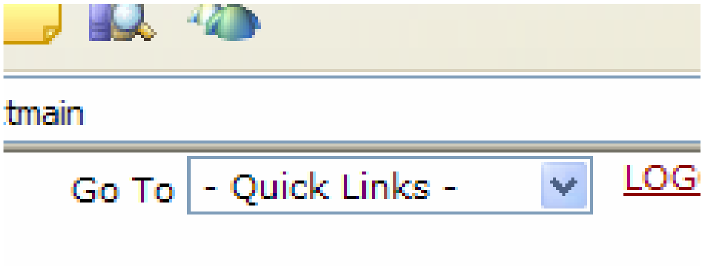


To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The Email link looks like this:

A blank email form will pop up, already addressed and ready to use.

13. The Quick Links provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from TripDirect to another product used by your school , all you have to do is click on the Quick Links drop-down box, choose the SchoolDude

product you'd like to visit, and you'll be taken to that product's **Home** page automatically. Quick Links is located at the top of the **Home** page screen, near the right-hand corner and looks like this:



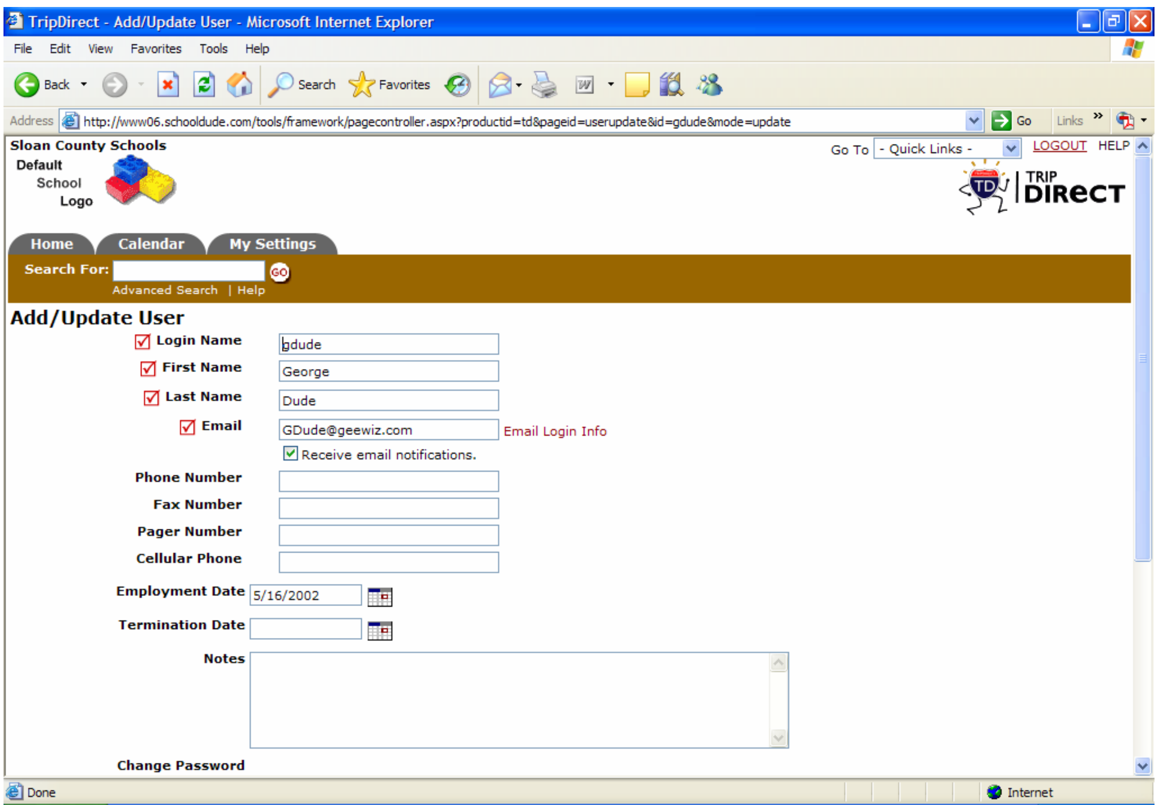
II. My Settings: Your Information in a Nutshell.

When you're getting started, it's a good idea to look at the **My Settings** page and make any changes in your information that you'd like to make.

On this page, you can view and edit your account information, entered during the Account Setup process by the Administrator. Fields marked with ☑ are required information. The rest of the information, however, is optional and changes can be made at any time.

Enter any contact information you wish to include (cell phone number, fax, etc.) as well as any notes.

Below is a view of what the **My Settings** page should look like:



To change your password and/or update any information that you have entered, follow the steps below:

- Enter your old password, set by the Administrator, into the Old Password field.
- Choose a new password and enter it twice, into the New Password and Verify New Password fields.

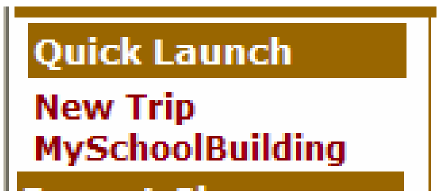
- Click Save.

You will then be taken back to your **Home** page. Your information has been saved. To change or update it at any time, click on the **My Account** tab and repeat the steps listed above.

III. MySchoolBuilding.com: Where to Make Your Trip Requests

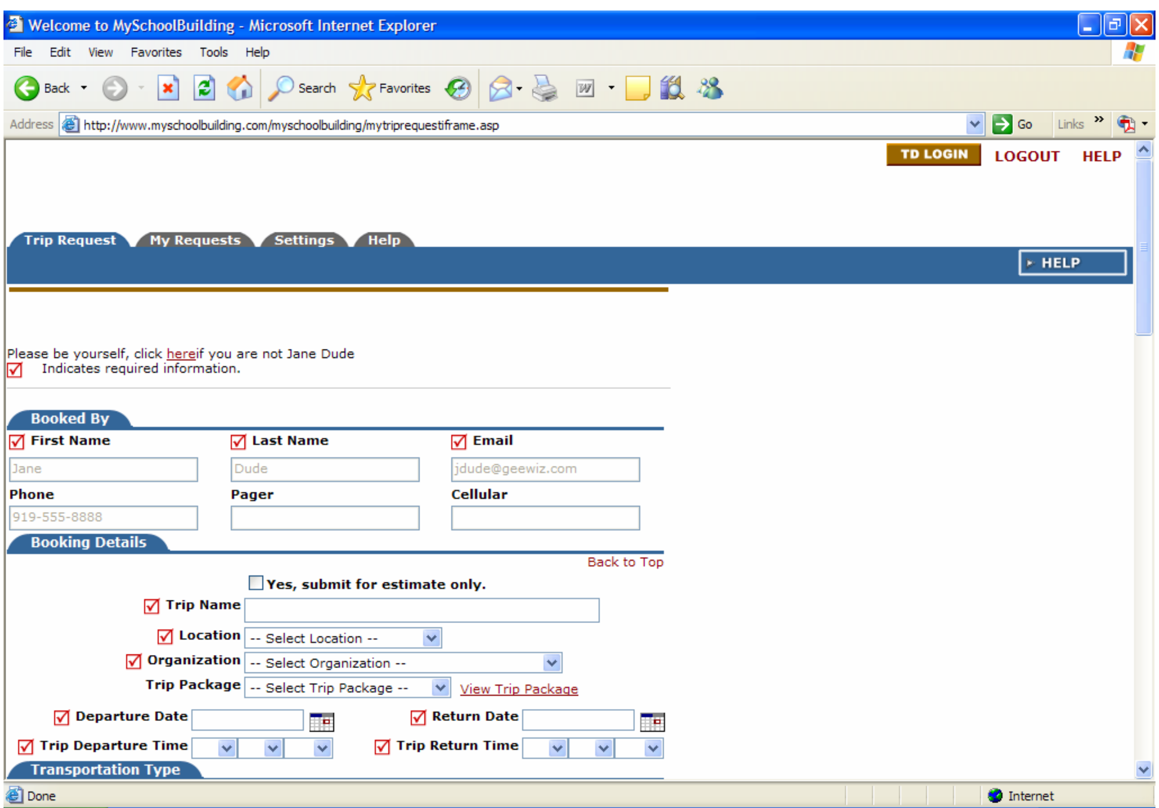
As a Service Provider, you do have the ability to create a new trip request. In order to do this, however, you must first go to MySchoolBuilding.com and log in using your email address.

To get started, click on the MySchoolBuilding link underneath the **Quick Launch** section of your **Home** page. Here is a close-up view of what the link looks like:



1. You Are Here…

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the **Trip Request** page. It should look something like this:



Across the top of the page, you'll notice four tabs labeled **Trip Request** (you are here), **My Requests**, **Settings**, and **Help**. These tabs are how you navigate to the information that you need. In the following sections, each tab will be explained. You'll see what they contain and how to use them.

2. The Settings Page

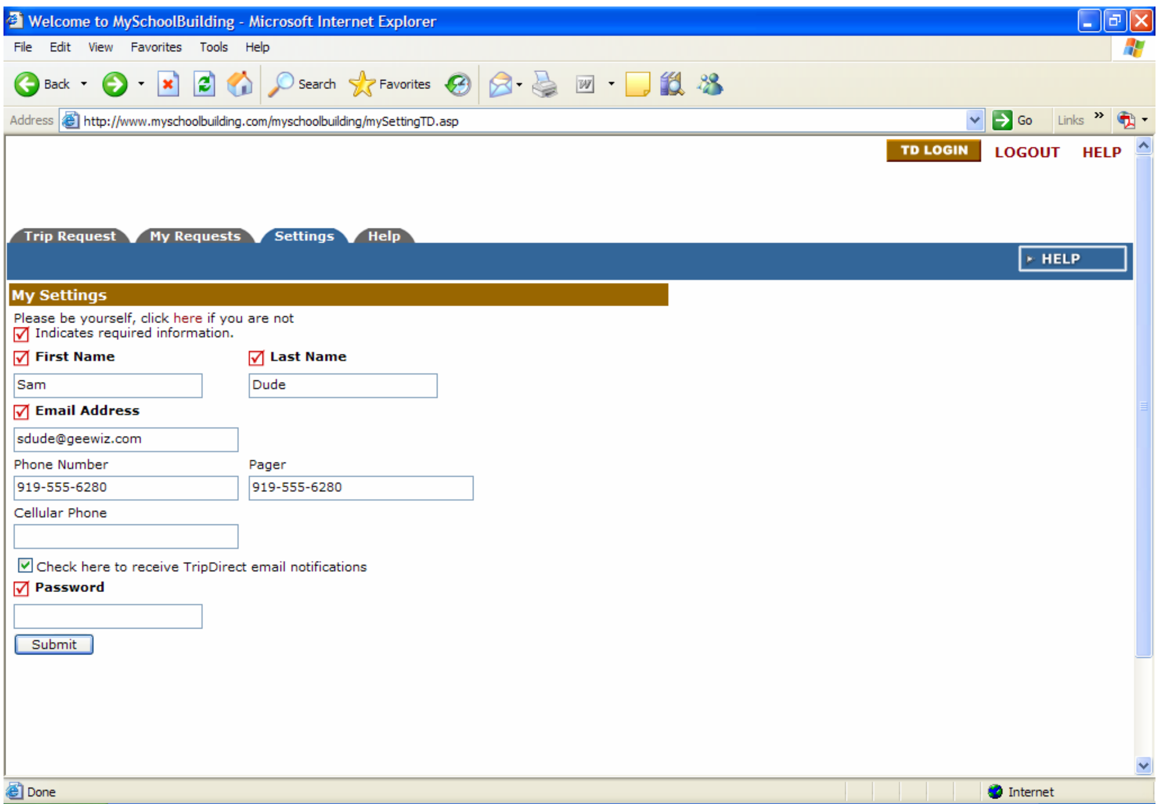
Before we get started making trip requests, lets take a moment to check out the **Settings** page, which contains your information as entered by the Adminstrator during the Account Setup process (if you set up your own account, this page will show the information you entered).

- Make any changes you wish to make, enter your password at the bottom, and click Submit.

OR

- To continue without making any changes, simply click the Back button at the top of your page or click the Tab of the page you wish to go to next.

If you have made changes, the page will refresh to bring up the same screen only now, the words "My Settings Saved" will appear in red at the top of the page. Proceed by clicking the Tab of the page you wish to go to near the top of the screen.



3. The Trip Request Page: What It Contains and How to Use It.

The **Trip Request** page is where you will fill out and submit your trip request forms. Once submitted, your request form will proceed on to the next person it has been routed to by the Administrator during the Account Setup process. This could be the Administrator him/herself, who can not only approve a trip request but can also activate it (the Administrator is the only person who can "activate" a trip request). Or it could first go to one, or a series of, Site Administrators who will then decide whether or not to approve your request. Based on their answer, your request will proceed on down the path routed for it until it is assigned its final status.

These are the nine statuses that a trip request can receive along the way, depending on what is going on during the trip approval process:

28) <u>**Submitted**</u>: Think of this as a new trip request. This is the status all trips will have when they are entered by a requester through MySchoolBuilding. It can also be used if entered by any other role to ensure proper routing of new trip requests.

29) <u>**Approved**</u>: Indicates that the request has been approved. It may have only passed through one person and may not have met final approval. The approved status has two statuses that aren't seen by the requester. They are "active" and "inactive". "Active" indicates that the request has met with final approval and has been activated as a trip that will occur. "Inactive" shows trips that are still in the approval process.

30) <u>**Pending**</u>: This status can be used to show trips that are in the approval process or waiting for additional information.

31) <u>**Canceled**</u>: This is used when a trip was active at one time and has since been cancelled. It is always a good idea to include the reason the trip was cancelled in the notes field.

32) <u>**Declined**</u>: The requested trip has been declined by the principal or the transportation department. We recommend listing a reason in the notes field.

33) <u>**Duplicated**</u>: This request has already been entered. It's always good to include the Trip ID number for the open trip in the notes field. This will tie the two requests together.

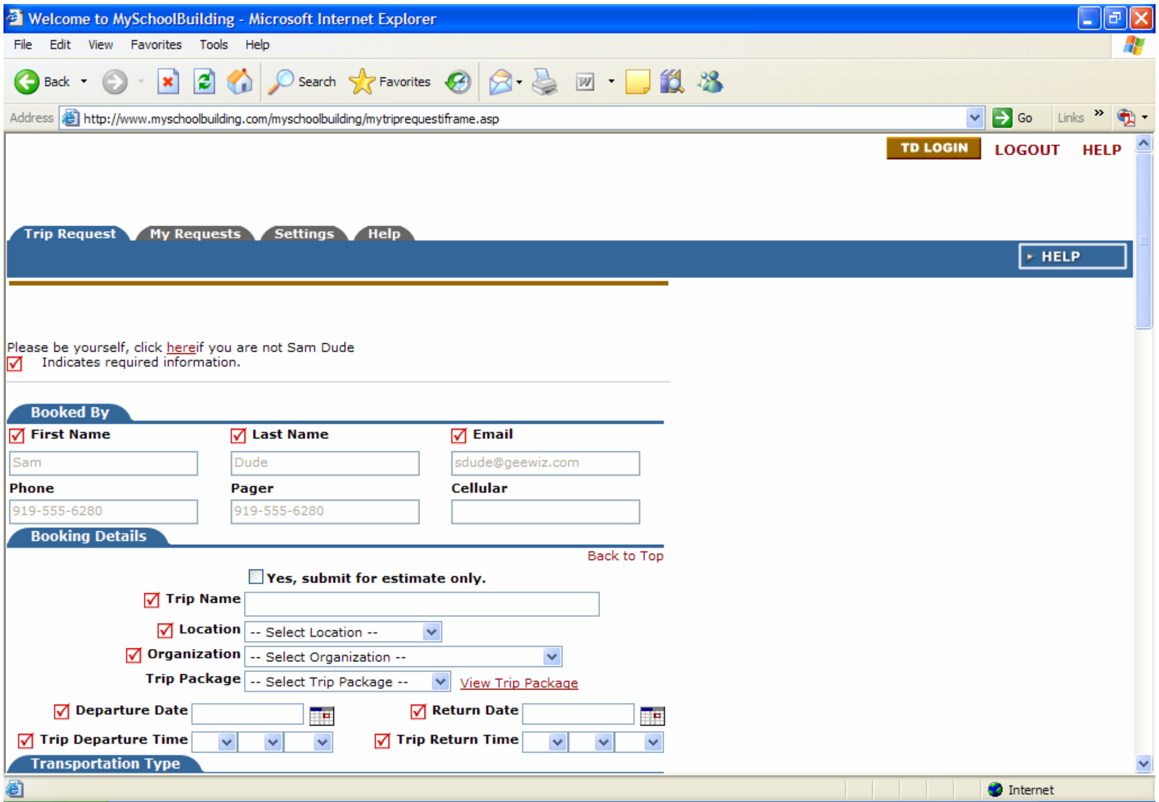
34) <u>**Estimate Requested**</u>: This is used when the requester (or site administrator) would like to get an estimate of what a trip might cost the school. This estimate will then be used to determine if taking the trip will ft in the budget.

35) <u>**Estimate Pending**</u>: Lets the requester know that the request has been received and the estimate is being calculated.

36) **Estimate Complete**: This status indicates the completion of a requested estimate. The requester will be able to view the estimated total by going to “My Requests” in MySchoolBuilding.

4. Making A Trip Request.

Ready to get started? This is where the trip-planning process starts—with a trip request. Below is a shot of what your **Trip Request** page should look like:



In this section of your manual, we'll walk you through the trip request process so that you can get started making trip requests with both hands on the wheel!

To request a New Trip, follow the steps below, keeping in mind that ☑ indicates a required field:

- Booked By: You'll notice that, as you are logged in as the Administrator, all of your information will already be entered into the fields of "First Name", "Last Name", "Email", and any further contact information that you entered in **Account Setup**.

- Booking Details: This section is full of drop-down boxes for your convenience. Start by filling out the required information: Trip Status, Location (what school or location the trip will be taken from), Organization (what group is taking the trip?), and Departure and Return dates and times.

Continue by filling in what remaining information you have that you would like to include: **Driver departure and return time** (what time the driver will start and end his shift that day), **Drop Off and Pick Up times** (what time the parents should drop off and then pick up their children), **Destination Arrival and Departure dates and times** (when those on the trip will arrive and depart their destination), **Driver's Start and End Locations**, **Drop Off and Pick Up Locations**, and the **Estimated Mileage** of the trip.

- Transportation Types: In this section, simply click on the icon for the type of transportation that will be used on this trip.

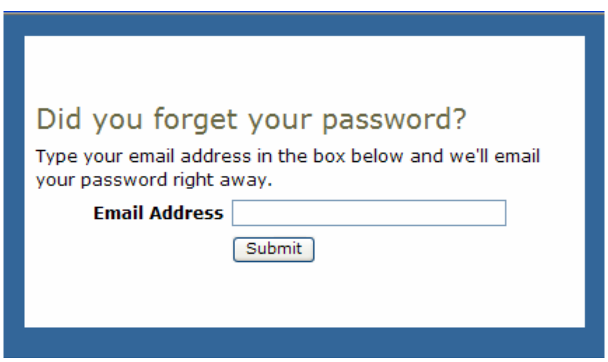
- Trip Contact: If the "Booked By" information is the same as the "Trip Contact" information, you'll save a little time by clicking the box at the top of this section.
  If not, fill in the **First Name**, **Last Name**, and **Email Address** of the Trip Contact, as well as any other contact information you may have (telephone, pager, and cell phone numbers).

- Attendees: Who will be going on this trip? In this section, you will need to fill in the **names of any faculty attending** the trip, as well as the **number of students attending**. Any further information (**names of supervising adults, number of adults and total attendees, cost of adults and students**) should be entered here as well.

- Notes: This is where you can make note of any special needs or requirements for the trip.

- Security: Once you've filled in all the necessary information on your trip, you'll need to enter your password here and click Submit Request.

  SCHOOLDUDE SAYS: If you've forgotten your password, click on the Forgot Password? link provided and a box asking for your email address will pop up. Type your email address in the space provided, click Submit, and your password will be sent to your email inbox.



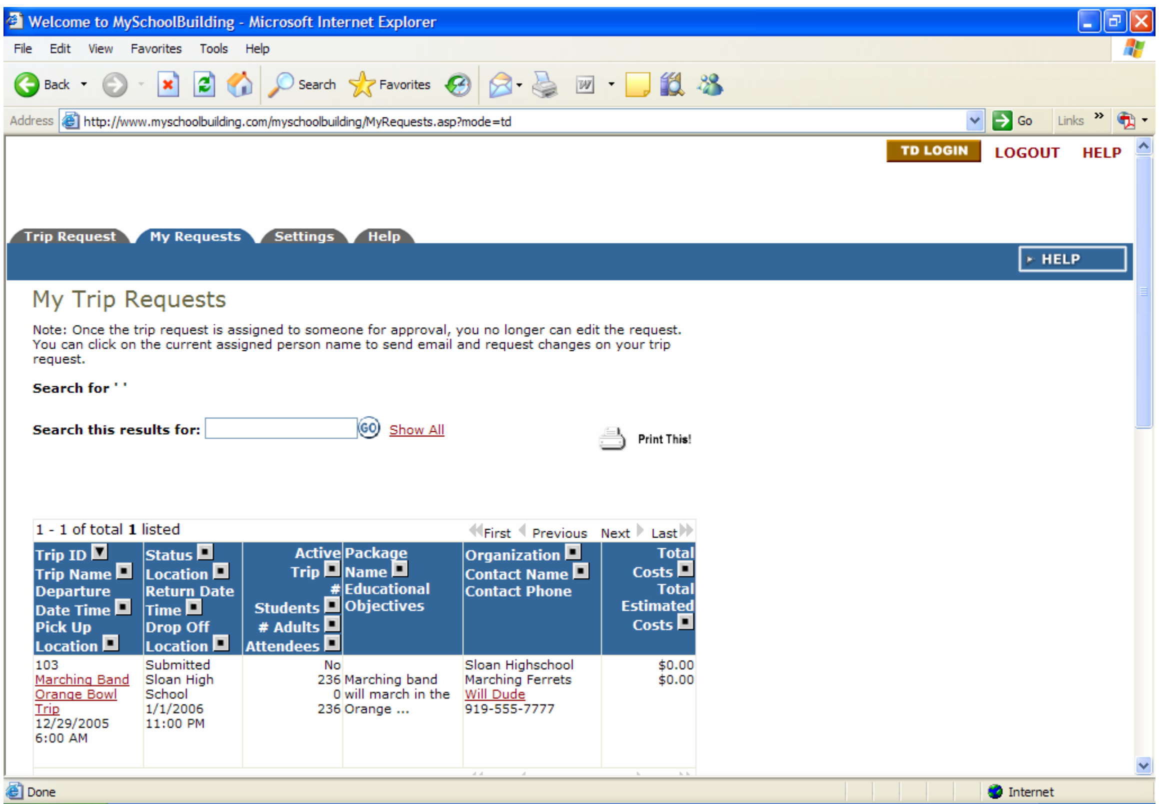
To continue, move on to the next (My Requests) section of your manual.

5. **My Requests:** Keep Track of Your Trip Requests.

Once you click Submit Request, you will be taken to the **My Trip Requests** page, where you'll see your trip listed. As you submit more trip requests, they will be added to the list on this page. The trip name will be highlighted in red and serves as a link that you can click on at any time to view your trip request.

(Keep in mind, however, that you will **NOT** be able to make any changes to a trip request once it has been approved, even if it hasn't been activated by the Administrator yet.)

Below is a view of the **My Trip Requests** page with a trip already listed as an example:

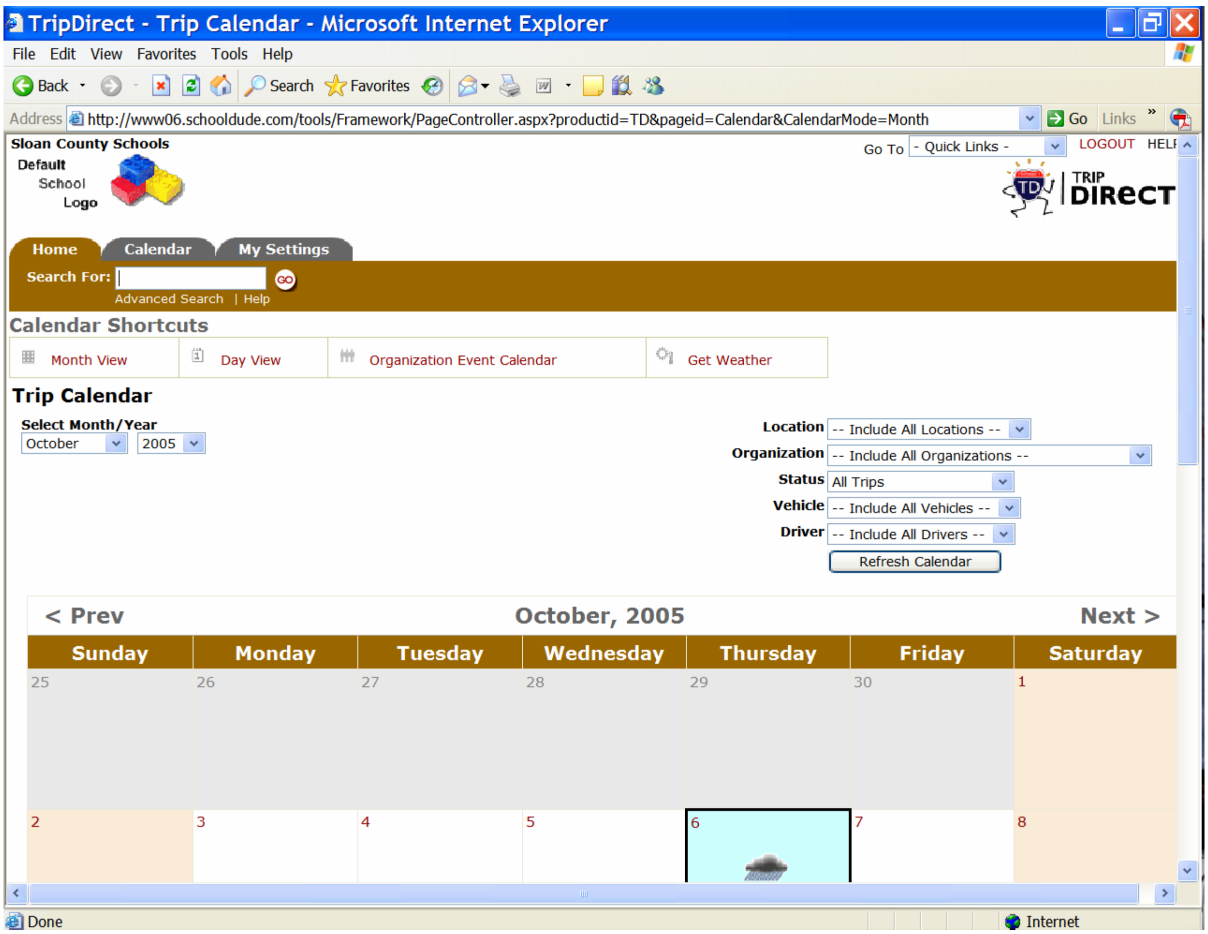


IV. Using the Calendar: See the Big Picture.

As with all SchoolDude products, TripDirect has a **Calendar** tab—a place you can go to see what's going on, where, when, and who's involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we'll show you how to use the calendar and all of its options to keep up with your busy schedule.

- To open up your calendar from wherever you are, click on the Calendar tab at the top of your screen.

The page that opens up will look like this:

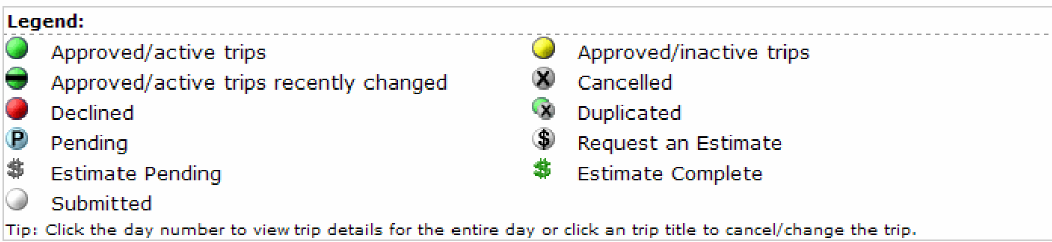


At the top of your screen, just above the words "**Trip Calendar**", are the **Calendar Shortcuts**: Month View, Day View, and Get Weather.

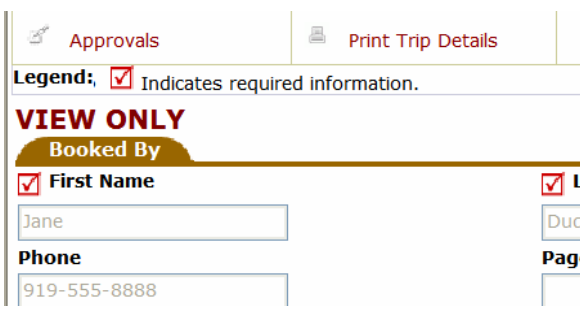
1. The **Month View** page shows you what's going on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The month you're currently in will display with arrows in the top left and right-hand corners that you can click on to navigate to **Previous** months or months coming **Next**.

On the Month View, each day shows in the traditional squares of a calendar, which contain any activity that may be going on: Trip Name and Number, along with a colored dot or symbol, which indicates that trip's status. The calendar legend is located near the bottom of the Month and Day View pages and looks like this:



- To obtain detailed information about a trip showing up on your calendar, simply click on the Name of that trip (shown in red) and you will be taken to the **Trip Request** page, containing all information recorded for that particular trip. Note that this page is **VIEW ONLY (see below)** so therefore, you won't be able to make any changes.



Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Prev and Next buttons.

To the right of this, you will see a series of drop-down boxes. What these allow you to do is sort your current month's calendar based on **Location**, **Organization**,

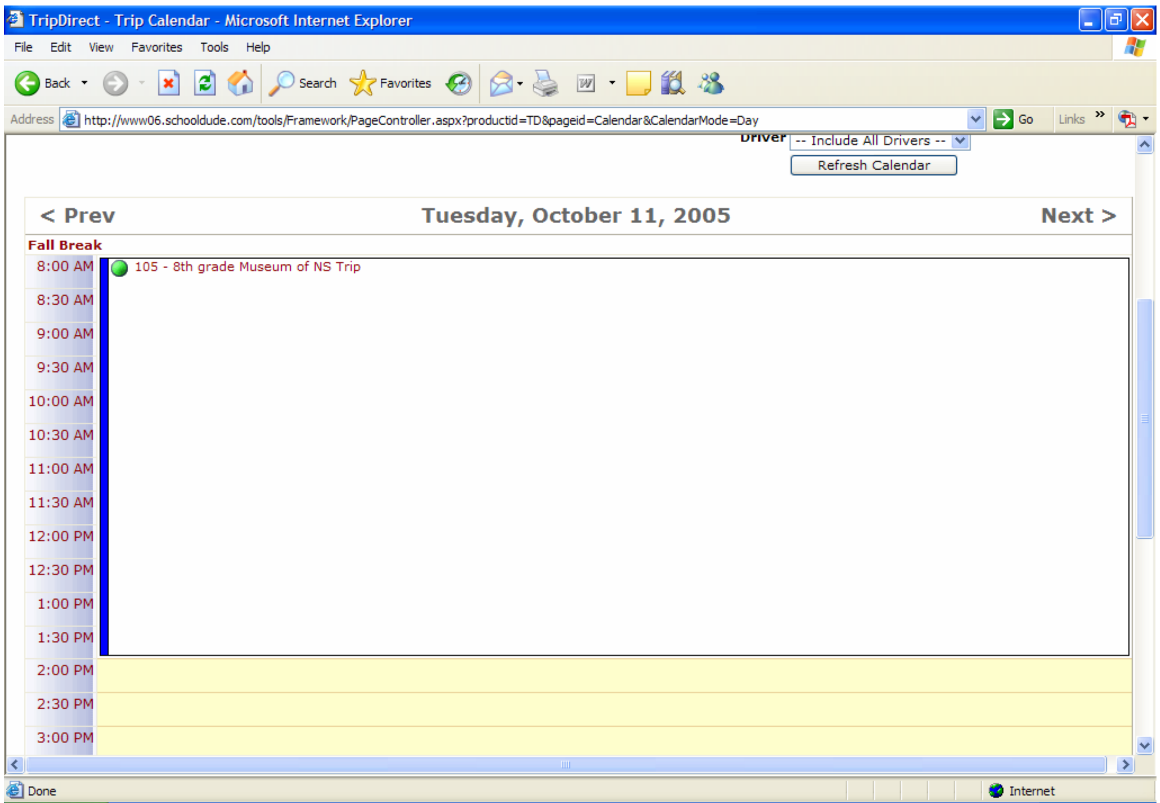
Status, **Vehicle**, or **Driver**. Choosing one of these and then clicking the Refresh Calendar button will show only trips fitting into that particular category.

To get a report on the weather, click on the Weather Icon, which appears on the calendar on today's date. You'll be taken to AccuWeather.com, which will pop up in a separate window.

2. The **Day View** page can be reached in two ways:

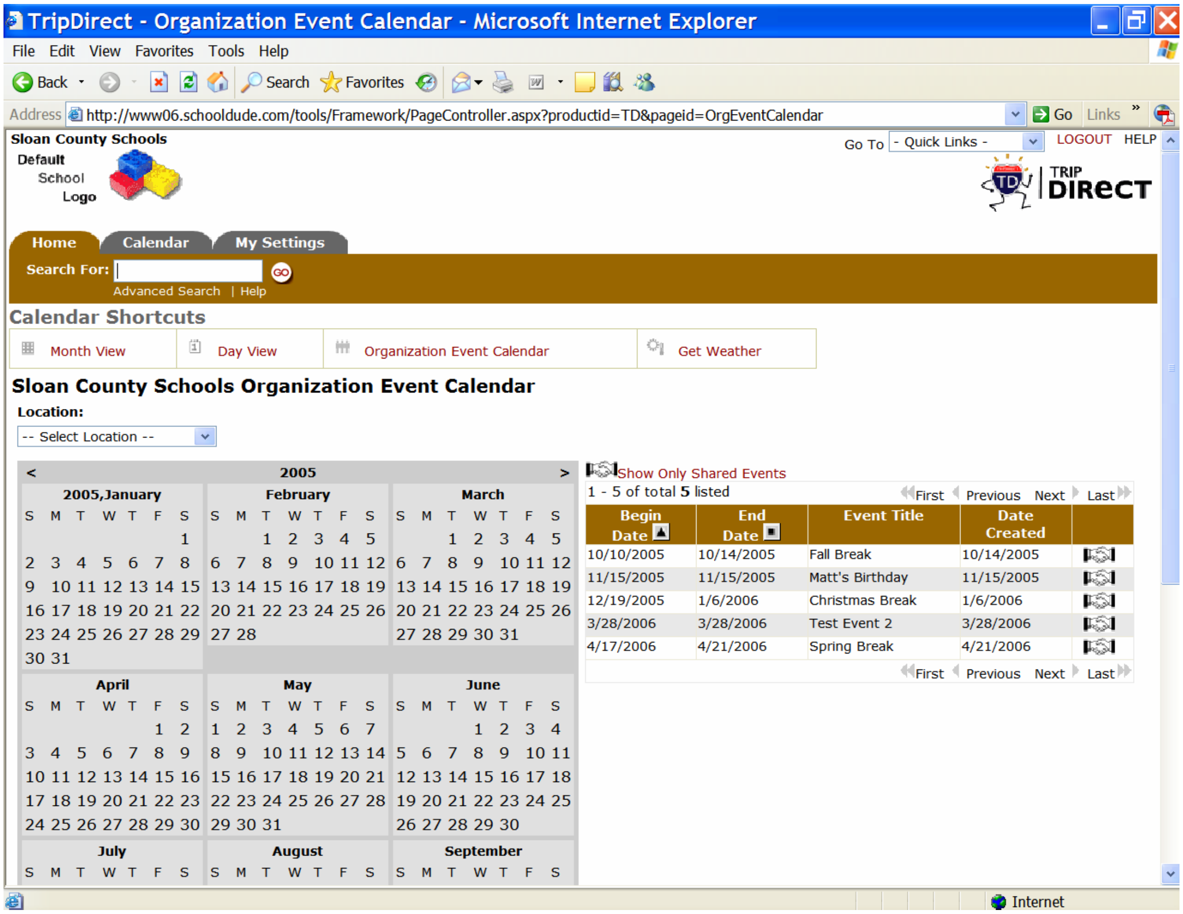
- Clicking on the Day View shortcut at the top of the page, or
- Clicking on the number of the date on the monthly calendar.

The Day View shows you what's going on, one day at a time, in half-hour increments. For example, if you have one trip on a particular day leaving at seven-thirty in the morning and returning at two, all 30-minute slots will be covered by that one trip between the hours of seven-thirty and two. See Below:



As with the Monthly View, you can navigate your **Day View** calendar by using the Prev and Next buttons in the top corners.

3. The **Organization Event Calendar** page is where you can go to see what events (such as school breaks, fund-raisers, and holidays) have been entered for organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and listed in more detail on the right-hand side. Below is a view of the Organization Event Calendar page, with events already entered:



4. The **Get Weather** shortcut, as with the weather icon on the main monthly Calendar, serves as a link to connect you with **AccuWeather.com** where you can check current weather conditions in your area or the area of your trip destination. You can also check the forecast with a range up to fifteen days.

- Simply click on the Get Weather shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.

SchoolDude Vocabulary

(A Lesson in SchoolDude-ish for TripDirect Users)

So you've hit a certain word or phrase and you have no idea what you've just read? Welcome to SchoolDude Vocabulary, a glossary created especially for SchoolDude clients to make all of that "SchoolDude lingo" a little less confusing. We've also included in this section a brief legend of the icons used throughout TripDirect.

Administrator: An Administrator has access to the entire TripDirect system, including the Account Setup. They see ALL trips on the Home page and Calendar. Administrators are the only ones who can "activate" Trips and create invoices. There can be as many Administrators as needed.

Approved: The status a trip holds once it has been viewed and allowed to continue on to the next role for eventual "activation".

Budget Codes: Designated funds coming from a specific budget that are applied to cover a particular trip's costs. If your organization doesn't use formalized budgets, you might still use arbitrary Budget Codes for tracking trip expenses. Some examples of Budget Codes are Travel Fund, Marching Band Trip Fund, History Club Fund, etc.

Calendar Event Types: These are whatever kinds of events that occur within your district or at you educational facility that are entered onto the Organization Event Calendar, under the Calendar section of TripDirect. Some examples of Calendar Event Types are Christmas Break, Graduation, Science Fair, etc.

Canceled: The status that a trip holds once it has been decided against or put off for another time. A trip can be canceled by anyone along the trip request route, including the requester.

Comptroller: serves as the "safety net" of trip request routing. Any request the system doesn't know what to do with gets sent to the comptroller. Also, if no service provider support is set up for a task, the task gets assigned to the comptroller.

Declined: This is the status assigned by an Administrator or Site Administrator 1 who, once the trip request is routed to them, decides that the trip should not take place for whatever reason.

Drivers: Anyone hired by your district or educational facility specifically for the purpose of transporting participants on a trip. This person could be internal (hired as an employee of the educational facility for this purpose) or external (hired on a temporary basis from an outside source or company, like a charter bus company).

Driver Certifications: Any certifications that your district or educational facility requires your drivers to maintain. Some examples are Commercial Driver's License (CDL), Emergency Medical Technician (EMT), etc.

Duplicated: A duplicate trip request. An example of this would be if two teachers that are taking their classes on a trip together submitted the same request. An Administrator would change the status of one of the trip requests to "Duplicate" and then use the other for submitting the trip details.

Estimate (Requested): Requesters have the option to submit a trip for estimate. This status alerts the transportation department that a teacher needs the estimated costs for the requested trip. This is usually done when a teacher has budget concerns.

Estimate Complete: This status tells a requester that their trip estimate has been completed.

Estimate Pending: This status alerts the requester that their trip estimate is in progress or pending completion.

Food Services: Whoever will be providing meals for students or participants on their trip. Some examples are Cafeteria, Box Lunches, Catering, etc.

IT Services: You will notice that there are almost 100 Information Technology services to choose from. This is a default list that comes from our IT Direct product. These are important because you will use them to specify what services are needed for a trip. They also will trigger task assignment when selected on the schedules. Most likely, you will only need to turn on a few of them.

Locations: Locations are typically used for campuses. If you manage a single campus, you may want to use Locations for different places or buildings on that campus.

Location Code: Used by some educational facilities to identify a specific Location. This may or may not be required information at your educational facility.

Maintenance Services: You will notice that there are over 180 maintenance services to choose from. This is a default list that comes from our Maintenance Direct product. These are important because you will use them to specify what services are needed for a trip. They also will trigger task assignment when selected on the schedules. Most likely, you will only need to turn on a few of them.

MySchoolBuilding.com: A web page that can be accessed by any role to allow anyone easy access to the request page. The person making a trip request may not have approval rights for the request they are making, so they enter it through MySchoolBuilding.com to put the request into routing. It also provides a user in one product with an easy way to request for a different product.

Organizations: The group or groups that are actually attending a trip, either internal or external. Some examples of Organizations are school clubs, athletic teams, Boy Scouts, etc.

Organization Number: This is the Organization's Account Number. It will be used by requesters to access the district's or educational facility's MySchoolBuilding.com page.

Pending: This is the status that a trip request holds while it is being decided by the Site Administrator 1 or the Administrator what should be done.

Requester: The people who make trip requests. They can submit requests for any location and can view any requests that they have submitted. Some examples of Requesters are teachers, coaches, organization leaders, etc.

Service Provider: Anyone who may need to perform work prior to a trip. They can see their assigned tasks on their Home page and their role is view-only. Service Providers also have a calendar tab and can see what trips are taking place at their locations. They can run some calendar reports showing what needs to be set up for events. Some examples of Service Providers are custodians, audio/visual technicians, security, kitchen staff, etc.

Shortcuts: Links that SchoolDude utilizes in all of its products so that users can navigate quickly from one page to another without clicking through a series of other links. These Shortcut links are usually located near the top of a page in a series of boxes. Different shortcuts are available on differing pages and they also vary from role to role. Here, for example, is what a few of the **Trip Request Shortcuts** look like:

Site Administrator 1: Anyone that may be needed to approve or decline trip requests for a location. They have access to all portions of the system except for the Account Setup. On the Home page, they only see trip requests that are routed to them at their assigned Locations, however, they can see trips taking place at any location by viewing the Calendar. They can't "activate" a trip; they can only approve trips for their Locations. Some examples of people who could possibly hold Site Administrator 1 positions are principals, site secretaries, athletic directors, etc.

Show-up Fee: (Or flat fee) This is a one-time fee for using one particular driver or an additional fee charged for the driver to show up. This is done to add flexibility to the unique charge type needs for different organizations.

Transportation Types: You will use these to specify what type of transportation will be utilized for a trip. Some examples of Transportation Types are Activity Bus, Charter Bus, Train, etc. They will trigger task assignment when selected on the schedules. Most likely, you will only need to turn on a few of them.

Trip Packages: Trips that are taken frequently or on a regular basis by your educational facility can be entered into TripDirect as a Trip Package. Once they are created as a Trip Package, information like educational objective, contacts, site details, additional costs, etc. will be stored. When the Trip Package is selected by a requester, all of that information will be filled in automatically on the Trip Request form.

Users: Anyone employed by your district or educational facility, in various roles, that uses TripDirect. These could be administrators, drivers, teachers, etc.

User Roles: There are five User Roles in TripDirect: Administrator, Site Administrator 1, Service Provider, Driver, and Requester.

Vehicles: Any cars, trucks, vans, buses, etc., that are owned and utilized for Trip transportation purposes by your district or educational facility. During the Account Setup process, the Administrator can record, in the Vehicles section, any information relevant to these vehicles such as operating costs, configuration, and service history.

Vehicle Configuration: The name and description of the different vehicles utilized by your district or educational facility.

Vendors: Any outside supplier or company that provides goods or services used by your educational facility during trips. Some examples of Vendors are local suppliers or transportation companies (AAA Travel, Hess Industrial Supply, Capital Bus Company, etc.).

Symbol/Icon Legend:

: Indicates required information.

: Click on this calendar icon to be taken to an interactive calendar where you can select the date you wish to use.

: The thumbs-up and thumbs-down icons indicate that a service or service provider is active or inactive, respectively.

: Click on this email icon to open up a blank email form.

: Click on this icon to sort information by the category it indicates (the category that it appears beside).

: Clicking on this icon will invert listed options or information.

: This icon is used on the Organization Event Calendar page and indicates an event that is shared by more than one Location.

This is the SchoolDude. He's your friend.

Help Reference

At SchoolDude, we understand that sometimes searching for answers to your questions can be frustrating. For that reason, we've included this page to give you a few quick sources to get you off the shoulder and back on the road.

1. Give us a call at 1-877-883-8337. We strive to answer your phone calls within the first three rings. Our friendly and helpful service professionals will be available to take your calls between the hours of 8 am and 6 pm (EST) Monday - Friday.

2. Drop us an email at the following address: support@schooldude.com. Someone will reply to your email or give you a call promptly, usually within an hour during regular business hours.

3. Chat live with a service professional by logging on to your account and clicking on the Help link in the lower right-hand corner of your **Home** page. It looks like this:

Click here to talk to
an Online Operator
NOW!

Or visit www.schooldude.com, click on Client Care, and choose **Technical Assistance** (shown in red) from the list on the right-hand side of the screen. See below: