

Field Trips – TransTraks

SBCUSD User Guide



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Field Trip Request process through TransTraks program

Below are the instructions for booking any type of field trip or athletic trip for SBCUSD sites and departments. If you have any questions that you don't find an answer to please call our department to better assist you at (909) 388-6125.

How To Access TransTraks Trip Request Center

Open your Internet Browser and in the Address Bar of the browser enter the following address:

<http://triprequest.transtaks.com>

- It must be typed exactly as found above. You can also create a shortcut on your desktop with the above address so you can just click the icon and it will go directly to the Trip Request Center.
- You can also save it in your Internet Favorites.
- Or you can access it through the district website under the field trips page and clicking on the TransTraks link. Click on the bus icon if you are going through the district transportation page. See below.

The screenshot shows the San Bernardino City Unified School District website. The header includes the district logo and name, along with navigation links for Parents, Students, Staff, and Board. A sidebar on the left lists links like '2017-2018 Empty Seat/Asiento Disponible', 'Contact Transportation', 'FAQ', and 'Field Trips'. The main content area has a red banner for 'Field Trips' and a note: '*If your name does not match the user name assigned to school site, please contact Transportation Dept at 909-388-6125 and ask for Miriam Avila.' Below this is a 'TRANSTRAKS' logo with a bus icon and the text '*Authorized users only'. At the bottom, a bullet point states: 'All Field Trip request must be filled out using TRANSTRAKS.'

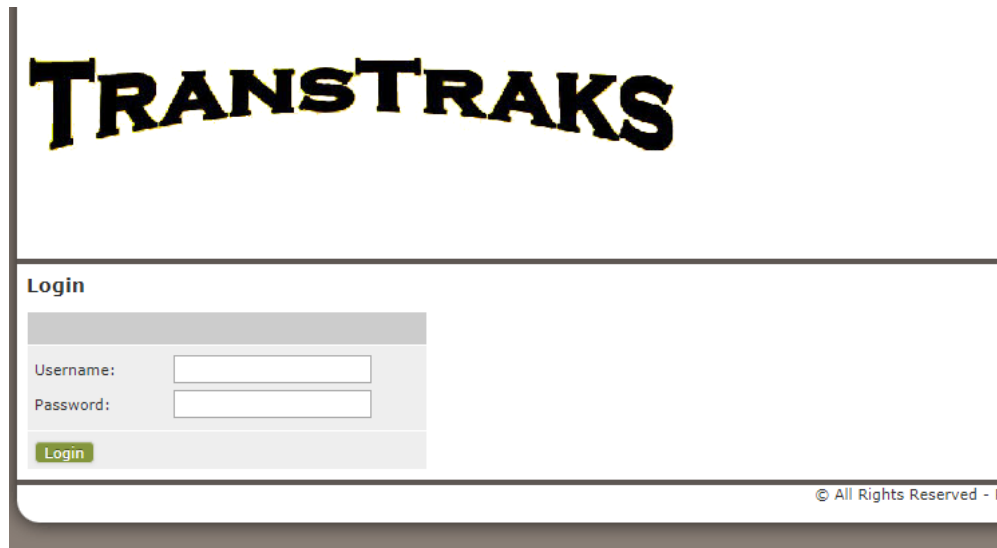
Sign-In With Your User Name and Password

Each elementary & middle school site will have 2 authorized users. High schools will have 3 users.

- Each authorized user has been assigned a user name and password. The sign-in screen looks like the image below. Both fields are case sensitive.
- If you need an account, please email Transportation, FieldTrips.

REPLY TO THE TRANSPORTATION, FIELDTRIPS email with ANY AND ALL CORRESPONDENCE. pg. 2

- If you are using someone else's account, please note your name in "Purpose."



TRANSTRAKS

Login

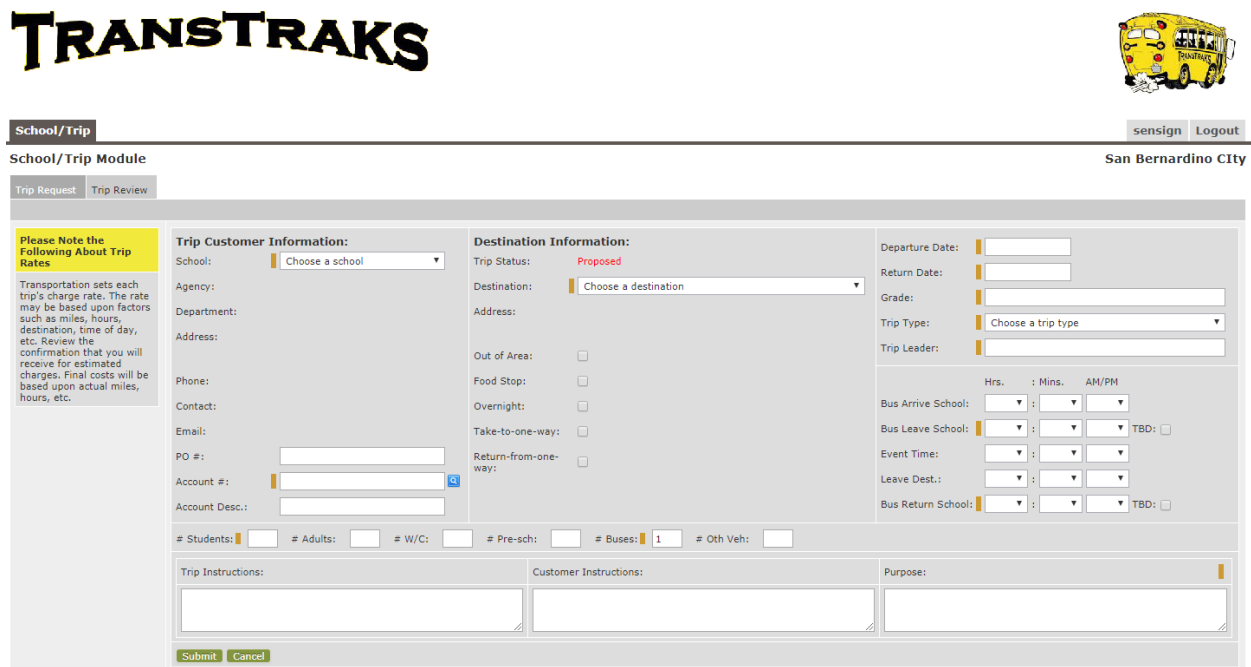
Username:

Password:

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Trip Request Screen

Once you have signed in, you will be taken to the Trip Request Data Entry Form. See the form below



TRANSTRAKS

School/Trip sensign Logout

School/Trip Module San Bernardino City

Trip Request Trip Review

Please Note the Following About Trip Rates

Transportation sets each trip's charge rate. The rate may be based upon factors such as miles, hours, destination, time of day, etc. Review the confirmation that you will receive for estimated charges. Final costs will be based upon actual miles, hours, etc.

<p>Trip Customer Information:</p> <p>School: <input type="text" value="Choose a school"/></p> <p>Agency: <input type="text"/></p> <p>Department: <input type="text"/></p> <p>Address: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Contact: <input type="text"/></p> <p>Email: <input type="text"/></p> <p>PO #: <input type="text"/></p> <p>Account #: <input type="text" value="1"/></p> <p>Account Desc.: <input type="text"/></p>	<p>Destination Information:</p> <p>Trip Status: Proposed</p> <p>Destination: <input type="text" value="Choose a destination"/></p> <p>Address: <input type="text"/></p> <p>Out of Area: <input type="checkbox"/></p> <p>Food Stop: <input type="checkbox"/></p> <p>Overnight: <input type="checkbox"/></p> <p>Take-to-one-way: <input type="checkbox"/></p> <p>Return-from-one-way: <input type="checkbox"/></p>	<p>Departure Date: <input type="text"/></p> <p>Return Date: <input type="text"/></p> <p>Grade: <input type="text"/></p> <p>Trip Type: <input type="text" value="Choose a trip type"/></p> <p>Trip Leader: <input type="text"/></p> <p>Hrs. : Mins. AM/PM</p> <p>Bus Arrive School: <input type="text"/> : <input type="text"/> : <input type="text"/></p> <p>Bus Leave School: <input type="text"/> : <input type="text"/> : <input type="text"/> TBD: <input type="checkbox"/></p> <p>Event Time: <input type="text"/> : <input type="text"/> : <input type="text"/></p> <p>Leave Dest.: <input type="text"/> : <input type="text"/> : <input type="text"/></p> <p>Bus Return School: <input type="text"/> : <input type="text"/> : <input type="text"/> TBD: <input type="checkbox"/></p>
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Students: # Adults: # W/C: # Pre-sch: # Buses: # Oth Veh:

Trip Instructions: <input type="text"/>	Customer Instructions: <input type="text"/>	Purpose: <input type="text"/>
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Trip Request Screen

Below are the 7 sections that require fields to be selected or date to be entered. If all sections are not completely filled out the request will not allow you to proceed to submit. Following the image below is a step by step overview of each section and what you will need to enter in each section.

The screenshot shows the TRANSTRAKS Trip Request screen. The interface includes a header with the TRANSTRAKS logo and a school bus icon. Below the header, there are tabs for 'School/Trip', 'Admin', 'gmarvel', and 'Logout'. The main content area is titled 'School/Trip Module' and 'Logged In Successfully'. The 'Trip Request' tab is selected. The form is divided into several sections, each highlighted by a red box and numbered 1 through 7:

- Trip Customer Information:** Includes fields for School (dropdown), Department, Address, Phone, Contact, Email, PO #, Account #, and Account Desc.
- Destination Information:** Includes fields for Trip Status (Proposed), Destination (dropdown), Address, and a section for 'Out of Area' with checkboxes for Food Stop, Overnight, Take-to-one-way, and Return-from-one-way.
- Departure Date:** Includes fields for Departure Date, Return Date, Grade, Trip Type (dropdown), Leader, Arrive School, Leave School, Event Time, Leave Dest., and Return School.
- Account Information:** Includes fields for PO #, Account #, and Account Desc.
- Vehicle Information:** Includes fields for # Students, # Adults, # W/C, Pre-sch, # Buses, and # Oth Veh.
- Purpose:** Includes a text area for Purpose.
- Submit/Cancel:** Includes buttons for Submit and Cancel.

Complete Trip Request

You will be required to enter in key data such as your school site, destination, dates, times of trip, etc. Some fields are required. You can tell by the colored (gold, bronze, tan) rectangle next to the field.

This close-up view of the form shows the 'Required' label in a blue box with an arrow pointing to the 'Departure Date' and 'Return Date' fields. The fields are highlighted with gold rectangles, indicating they are required. The 'Required' label is also highlighted with a blue box.

- Complete one entry for each trip regardless of the number of buses.
 - Trips are not assigned Trip #'s until the Transportation Department performs a sync function
- REPLY TO THE TRANSPORTATION, FIELDTRIPS email with ANY AND ALL CORRESPONDENCE. pg. 4

Trip Request Screen – select school site or department

Section 1: Choose your school site/department from the drop down. Depending on your authorization most users will only see their school's name or department's name. (See image 1-1)

1-1

TRANSTRAKS

School/Trip

School/Trip Module

Logged In Successfully

Trip RequestTrip Review

Please Note the Following About Trip Rates

Transportation sets each trip's charge rate. The rate may be based upon factors such as miles, hours, destination, time of day, etc. Review the confirmation that you will receive for estimated charges. Final costs will be based upon actual miles, hours, etc.

Trip Customer Information:

School:

Agency: San Bernardino City Unified School District

Department: None

Address: 3395 Mountain Ave
San Bernardino, CA 92404

Phone:

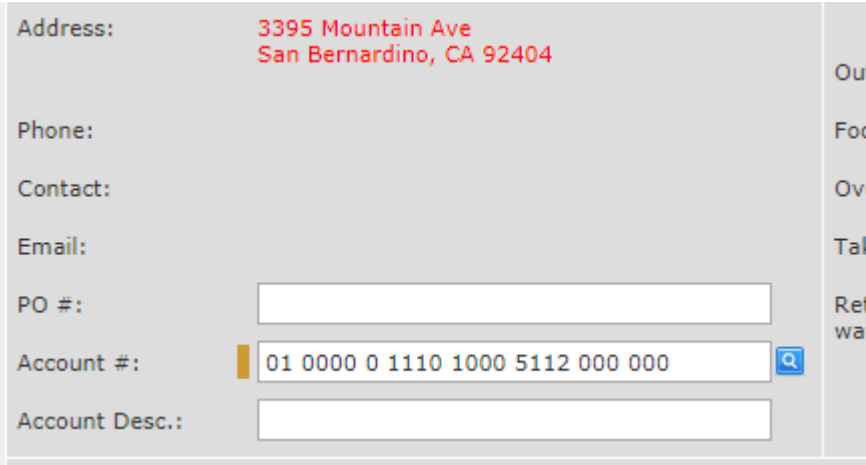
Contact:

Trip Request Screen – account numbers

Section 2: Enter the appropriate Account Number that will be paying for the trip.

- You can use the magnifying glass icon to the right of the Account # field to see up to six pre-defined account codes for this school or department. (See image 2-1)
- You can also enter a different account string if appropriate. This is a required field. Just below it is an Account Description field that is optional. (See image 2-1)
- If this is a WALKING, PUBLIC TRANSIT, OR PRIVATE VEHICLE – Choose site budget and type in “Account Desc.,” what transportation is being used. Budget will not be charged.

2-1

A screenshot of a web form titled "Trip Request Screen". The form has a light gray background. On the left, there are labels for "Address:", "Phone:", "Contact:", "Email:", "PO #:", "Account #:", and "Account Desc.:". The "Address:" field is filled with "3395 Mountain Ave" and "San Bernardino, CA 92404" in red text. The "Account #:" field is filled with "01 0000 0 1110 1000 5112 000 000" in blue text, and there is a magnifying glass icon to its right. The "Account Desc.:" field is empty. To the right of the form, there is a vertical sidebar with buttons labeled "Out", "Foo", "Ove", "Tak", "Ret", and "way".

Trip Request Screen – trip status

Section 3: Note that each newly entered trip is classified as “Proposed.” For Durham requested trips, the status changes to “Approved” when the trip is audited and approved, then finally updated to “Scheduled” when all trip is scheduled with a Durham.

- To enter a Destination you can start typing the name of the destination or use the drop down arrow to see the alpha list of destinations. (See image 3-1)
- Select your destination by clicking on the correct one.
- Only check the boxes if you are requesting a meal stop or require one of the 5 options listed. For all meal stops: state a destination, address, and times at location in “Purpose.” (See images 3-1 & 3.2) [Max Characters: 255]

3-1

Destination Information:

Trip Status: **Proposed**

Destination:

Address:

Out of Area: ☐

Food Stop: ☒

Overnight: ☐

Take-to-one-way: ☐

Return-from-one-way: ☐

- If you can't find a trip destination, select "New Destination" and then enter where you want to go in the Purpose Box (see image 3-2), including name of destination, address, city, state, zip. Transportation will then enter the destination for you in the database. [Max Characters: 255]

3-2

Purpose:

New Destination - Ice Town
10504 Magnolia Ave. Riverside, CA 92505

Purpose:

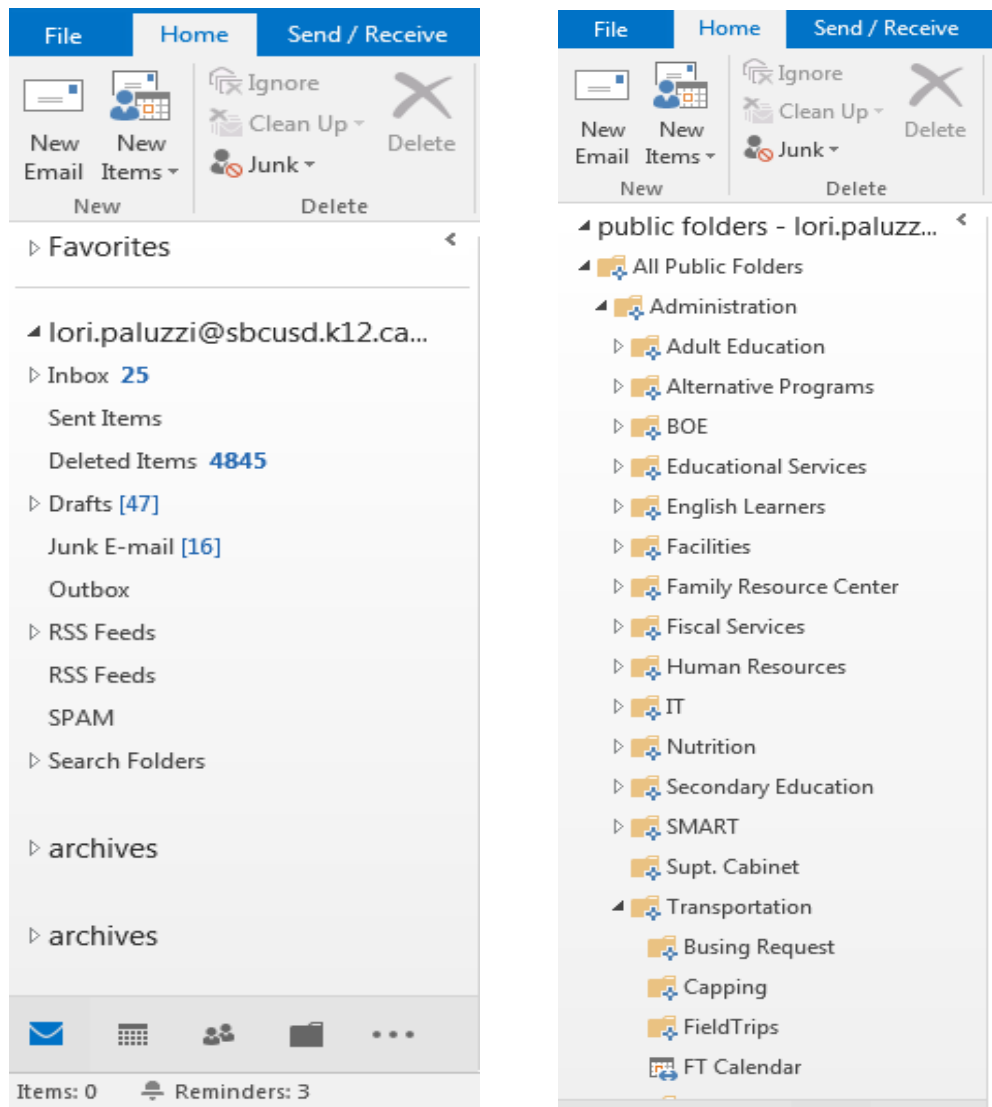
Food Stop: InNOut, 795 W. 5th St, SanBndg, 92410; 11:00-12:00pm

Trip Request Screen – dates, times, trip types, & estimates

Section 4: The next section requires 7 fields to be completed. They can't be left blank in order to be able to submit your request.

- Check OUTLOOK Public Folders for date availability (see image 4-1)
 - Folders Icon at the bottom left
 - Scroll down to Public Folders
 - All Public Folders
 - Administration
 - Transportation
 - FT Calendar Right-Click (Add to Favorites)

4-1



- Departure and Return Dates can either be typed in or selected from the pop-up calendar. If typing, use the MM/DD/YYYY format.

4-2

Departure Date: 11/20/2017

Return Date:

Grade:

Trip Type:

Trip Leader:

Bus Arrive School:

- The Grade and Trip Leader fields are free-form fields (must type in). You may enter a grade range or one specific grade. The Trip Leader field you will want to enter the teacher's name who is organizing or requesting the trip. (See image 4-3)
 - Grades are mandatory for all Swimming Field Trip Requests
- Under Trip Type, use the drop down to select the appropriate trip type. Any field trip a school site takes not involving athletics would fall under educational. (See image 4-3)

4-3

Departure Date:

Return Date:

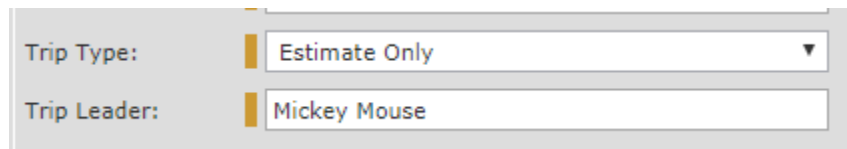
Grade: K-6

Trip Type: Educational

Trip Leader: Charlie Brown

- If you only need an estimate you can select the Estimate Only option on the drop down menu in the Trip Type field. (See image 4-4) You will need to fill out the entire form as you would for any requested trip and follow all the steps. **Filling out an estimate does not mean you have booked a trip. It is just an estimate request.**
- Once you receive a quote from the transportation department and you decide you would like to take the trip **you must fill out a Change Memo Form** and send it to the Transportation,Fieldtrips email in Outlook.
 - Subject Line: "Site Change to Trip TripID# Date Destination"
- If you decide that you don't want to take the trip that you requested the estimate for, please send a courtesy email to the Transportation,FieldTrips email cancelling your estimate.

4-4



The image shows a portion of a web form. It has two rows. The first row is labeled 'Trip Type:' and has a dropdown menu with 'Estimate Only' selected. The second row is labeled 'Trip Leader:' and has a text box containing 'Mickey Mouse'.

- Bus Arrive School is the time the bus arrives at the school to LOAD students. This field is required for all SBCUSD trips even though it's not highlighted. For Example, you will want to take into account LOADING time, going over emergency evacuation and safety procedures for every trip (5-10 minutes). (See image 4-5)
- Leave School time is a required field. You can estimate a time or use the LOAD time again, but we schedule busses according to LOAD times. Please indicate AM or PM. (In the event that you will not know the time of your trip please check off TBD box (To be determined)). This scenario would mostly likely occur with athletics. (See image 4-5)
- Leave Dest is the time the bus will LOAD from the destination of the trip. Please remember that buses can't exceed 55mph at any time (Buses are never allowed to carpool or use Toll Roads). Please consider the time of day, location, weather, and traffic conditions. A 30 mile trip that may take 45 minutes in an automobile could take over an hour on a bus. (See image 4-5)

MUST DEPART DESTINATION AT STATED DEPART TIME, FAILURE TO DO SO MAY AFFECT OTHER TRIPS THAT ARE SCHEDULED FOR THE DRIVER(S), SAME DAY OR NEXT DAY.

- Bus Return School time can be same LOAD time or you can estimate a return. Please reference the Leave Dest time if you estimate a reasonable time. (See image 4-5)

4-5

Trip Request Screen - # of riders, wheelchair riders, & buses

Section 5: Enter total # of Students, # Adults, # W/C (wheelchairs), # of Required Buses, # of Oth Veh (other vehicles like mini buses).

- Your passenger counts are critical. A trip could be severely disrupted if there are more students and adults than you requested and the buses ordered do not have enough room.
- Wheelchair counts are particularly important and require a specific type of bus. Call Transportation if you need help understanding how many buses to order.
- Trips involving water activities require a different ratio of adults/chaperones. Per district AR 6153 see the ratios below:
 - Grades TK – 3rd 1 adult for every 4 students
 - Grades 4th – 6th 1 adult for every 8 students
 - Grades 7th – 12th 1 adult for every 10 students
- “#Other vehicle” should also be used with walking, public transit, or private vehicles.

Correct number of students and adults is very important for the number of buses. Call transportation if you need help understanding how many buses to order. **IF STUDENT COUNTS CHANGE BEFORE THE TRIP ADVISE AT LEAST 48 HOURS IN ADVANCE.** The phone number is (909) 388-6125. (See image 5-1)

5-1

Trip Request Screen – purpose field use & examples

Section 6: The Purpose box is where you indicate specific trip needs and requests. Provide such specifics as “Storage required for 50 lunches.” This Purpose box is also where you will indicate the following, but not limited to:

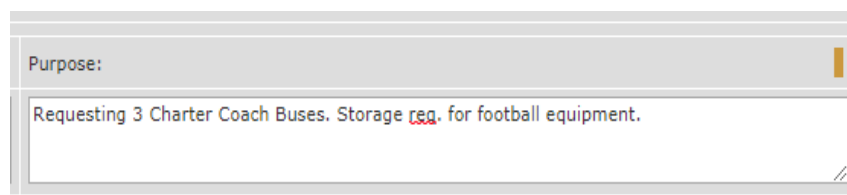
- Use this box to also include anything that Transportation and the District might need to know that is not covered in the other boxes. (See images 6-1)
- Star seats, safety vests, & car seats should be indicated if any of the riders require one in the Purpose box. Send a student list with Transportation IEP Needs. (See images 6-1)
- Request for mini buses for special education students or for groups smaller than 16 should also be indicated in the Purpose box. No storage on mini busses. (See images 6-1)
- “Storage required for ???”. Not all busses come equipped with Storage and it is not guaranteed.
- If you are requesting a luxury charter or coach bus you must indicate that in the Purpose field. Otherwise all buses requested will be yellow school buses. (See images 6-1)

6-1



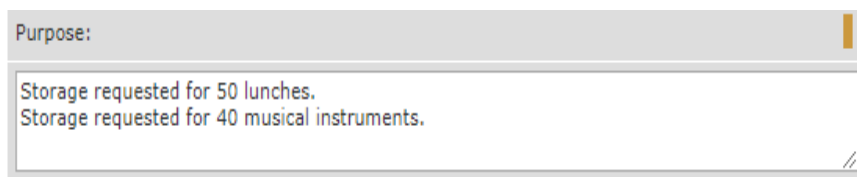
Purpose:

2 mini buses required
10 star seats required



Purpose:

Requesting 3 Charter Coach Buses. Storage req. for football equipment.



Purpose:

Storage requested for 50 lunches.
Storage requested for 40 musical instruments.

- Purpose field must contain characters or you will not be able to Submit.

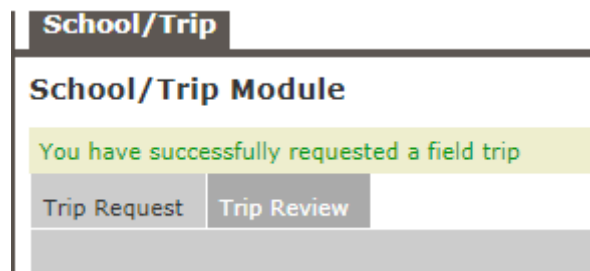
- All trips will automatically be booked through our bus contractor which only provides yellow school buses. Our contractor offers the lowest rate. If you are requesting a different type of transportation you must indicate so in the Purpose field. Below is general cost break down.
 - District contractor yellow school buses – cheapest rate
 - Charter Yellow School buses – mid range rate (Approved vendor, but not contractor)
 - Luxury Charter Coach buses – highest rate
- **Charter Vendors:** In TransTraks when requesting a charter vendor the trip status will show “Proposed”, then “Confirmed” while we are auditing the trip and contacting vendors. This does not mean it is scheduled until you physically sign the trip confirmation with the vendor and send it to the Transportation,FieldTrips email. This will be your actual trip confirmation page, if it is not signed, buses may or may not be scheduled and if applicable, cancellation fees may apply. Cancellation is minimum 48 hours in advance and cancellation fees vary per vendor.

Trip Request Screen - Submitting trips

Section 7: Click the SUBMIT button when finished to enter the trip into the database.

- Once you click on SUBMIT the Trip Review Screen then appears, and the tan band reads “You have successfully requested a trip.” (See image 7-1)

7-1



- If you missed a required field, you will get error messages telling you what you missed and giving you the opportunity to fix these errors. The required fields will be in green. Once you correct them you will be able to click SUBMIT.

7-2

School/Trip

School/Trip Module

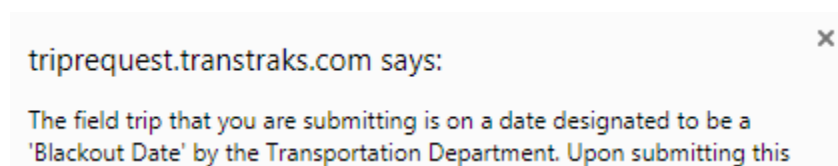
The Departure Date field is required.
The Return Date field is required.
The Grade Level field is required.
The Trip Type field is required.
The Leader field is required.

Trip Request Trip Review

Please Note the Trip Customer Info

- If you receive the message shown on image 7-3 below, the date you selected is full with trips. Blackout Date message alerts we are most likely unavailable or close to being unavailable. If we can schedule it, it will show “Approved.” If we cannot, we will contact you regarding a Charter vendor. (See image 7-3)
- Allow 48 hours for a trip to be “Approved” and/or “Scheduled.”
- Upon “Scheduled” status – send an email confirmation to the teachers so they can verify student count and LOAD times. If any changes are needed, a change memo form is required. Advise Nutrition Services about lunches. Place all destinations on Field Trip Permission Slips.

7-3



- If you change your mind and do not want to submit the trip, click on the CANCEL button in the lower left hand side of the form. By clicking the CANCEL button all fields on the trip request form will be blank.
- Once you hit the Submit button and you then wish to cancel, you will need to contact the Transportation department and speak to the field trip coordinator. The phone number is (909) 388-6125.

Review Your Trips

Box A: Filter Options - Choose the appropriate options or dates to facilitate a search.

Example: Enter a date range, select your school, and then click the Filter button. Within the filtered selection, click on column headers to sort. To print the selection, click the printer icon located above the selection (under the tan band). To clear the filtered selection, either remove the date ranges and click Filter, or click the Trip Request tab then return to the Trip Review tab.

Box B: Click on a header to sort trips - You can toggle between sorting A-Z or Z-A.

TRANSTRAKS

School/Trip

Admin gmarvel Logout

School/Trip Module

Trip Request Trip Review

Filter Options:

- All Trip Numbers
- All Schools
- All Departments
- All Destinations
- All Statuses
- All Trip Types
- All Submitters
- Departure Date Range
- Filter

Trip #	Departure	Return	Submitted	Status	School/Dept.	Destination
19	2006-02-01 01:15 PM	2006-02-01 06:45 PM	2006-01-27	Completed	E. TransTraks Elementary	Costa Mesa High School
153	2006-02-01 01:30 PM	2006-02-01 04:30 PM	2006-02-01	Completed	TransTraks Canyon Elementary	Canyon High School
40	2006-02-01 01:45 PM	2006-02-01 02:45 PM	2006-01-10	Completed	W. TransTraks Elementary	Santa Ana HS
37	2006-02-01 01:45 PM	2006-02-01 04:45 PM	2006-01-10	Completed	W. TransTraks Elementary	Kelly Stadium
36	2006-02-01 02:15 PM	2006-02-01 07:00 PM	2006-01-10	Completed	W. TransTraks Elementary	Tustin HS
41	2006-02-01 03:45 PM	2006-02-01 06:30 PM	2006-01-10	Completed	W. TransTraks Elementary	Kelly Stadium
146	2006-02-01 05:30 PM	2006-02-01 03:30 PM	2006-01-25	Completed	TransTraks Canyon Elementary	Santa Ana HS
75	2006-02-01 08:30 AM	2006-02-01 01:30 PM	2006-01-11	Completed	N. TransTraks Elementary	UC Irvine
38	2006-02-01 08:30 AM	2006-02-01 10:45 AM	2006-01-10	Completed	W. TransTraks Elementary	Bowers Museum
39	2006-02-01 08:45 AM	2006-02-01 12:00 PM	2006-01-10	Completed	W. TransTraks Elementary	Bowers Museum
156	2006-02-02 01:15 PM	2006-02-02 05:30 PM	2006-02-02	Completed	TransTraks Beach Elementary	Costa Mesa High School
46	2006-02-02 01:30 PM	2006-02-02 04:00 PM	2006-01-10	Completed	W. TransTraks Elementary	El Toro High School

If you need to check the status of a trip, date it was submitted, date & time of the trip you may do so under the trip review option. Below are the status definitions:

- Approved status – Once a trip is in Approved status, the trip is considered booked. Approved will apply to Durham Yellow School Bus trips. You will also be able to see the estimated cost.
- Billed status – Trip will change to billed status, pending for an invoice, this is still an estimate.
- Completed status – This status is used for WALKING, PUBLIC TRANSIT, OR PRIVATE VEHICLE. No budget will be charged for these trips.

- Confirmed status – This status will be used for charter yellow school bus or charter coach bus. Physical confirmations need to be signed and returned to schedule these trips.
- Denied – Trip is not cancelled nor scheduled. Trip is pending missing or requested information. An email is sent, reply ALL with information needed to schedule the requested trip.
- Paid status – Once our department receives an invoice the trip will go to a paid status. This will be the actual cost of the trip being charged to the assigned budget.
- Proposed status – Once you submit your trip it will remain in this status until we do a field trip sync and it is audited by transportation.
- Quoted status – This status will be used for estimates only. These are not scheduled trips and dates will continue to book up. Please remember that you will need to fill out a Change Memo Form in order to actually book the trip, which will be treated like a new FT Request. If a trip is not needed send a cancel estimate to the FT Email.

Box C: Click on the envelope icon to email Transportation or another District department regarding changes or updates to a trip -

The trip information will automatically be included in the body of the email. Click the printer icon to print trip details on the line indicated or the printer icon above the selection to print all the trip in your filtered selection.

- Other Info: TranTraks cannot receive emails please reply TO THE TRANSPORTATION, FIELDTRIPS email with ANY AND ALL CORRESPONDENCE.

Logging Out

Once you have entered all trips or review your trip review history click on the logout option on the top right hand corner under the yellow school bus. (See image below)

