



TripDirect User Manual  
**Requester Guidelines**  
Version 1.0  
SchoolDude.com, Inc.

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# Requester Guidelines

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# Requester Guidelines

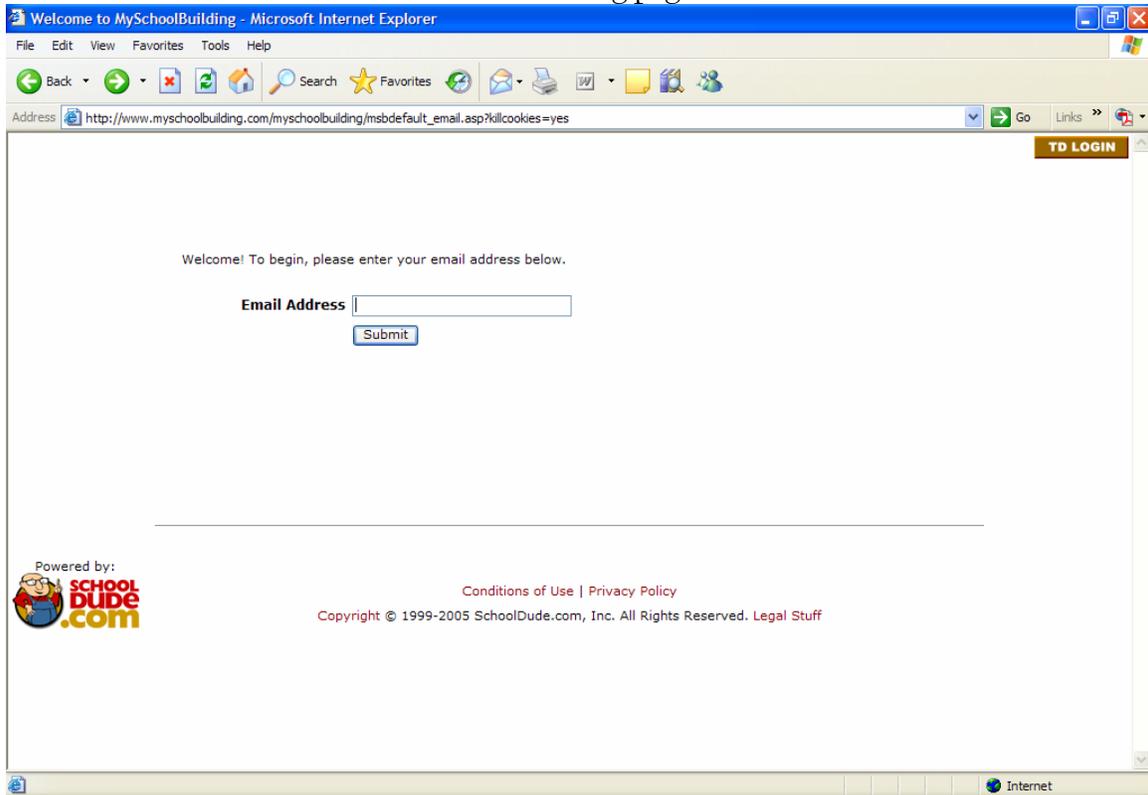
## I. Welcome to TripDirect! Now What? (A Word On How to Get Started)

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.

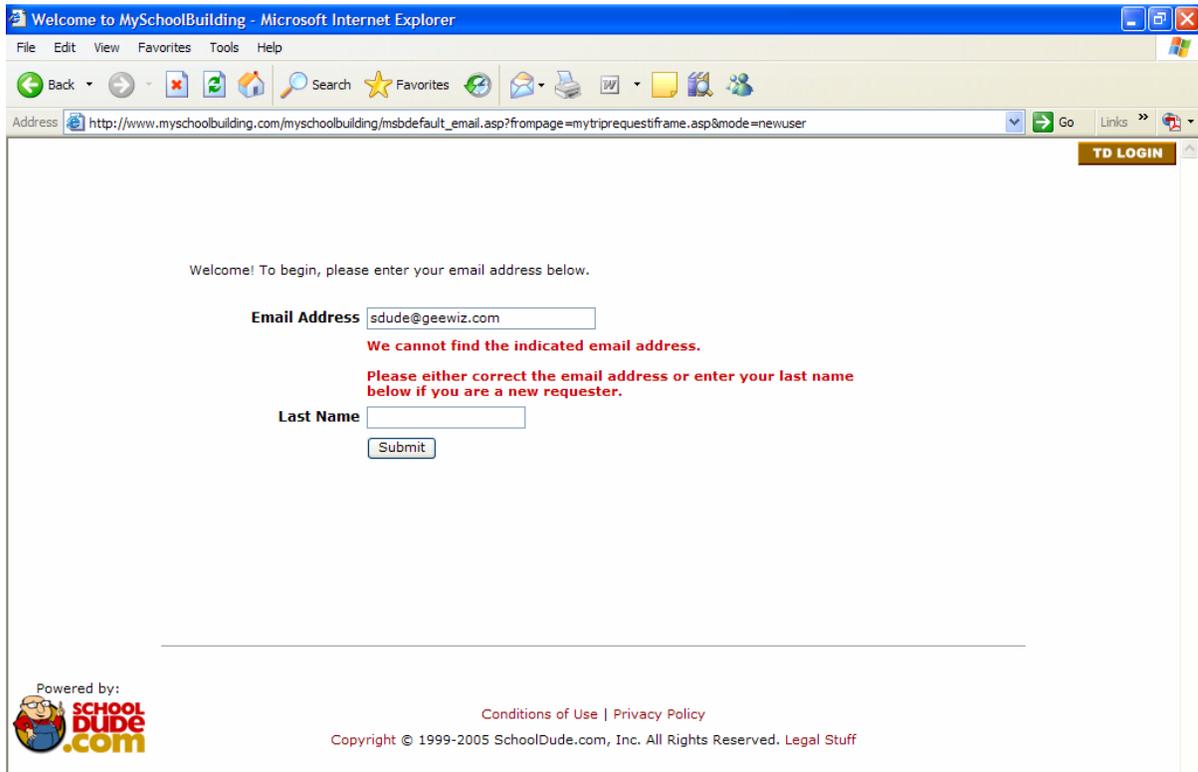
If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

1. Go to [www.myschoolbuilding.com](http://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:

Welcome to MySchoolBuilding - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address [http://www.myschoolbuilding.com/myschoolbuilding/msbdefault\\_email.asp?frompage=mytripequestiframe.asp&lastname=dude&mode=newuserlist](http://www.myschoolbuilding.com/myschoolbuilding/msbdefault_email.asp?frompage=mytripequestiframe.asp&lastname=dude&mode=newuserlist) Go Links

**TD LOGIN**

Welcome! To begin, please enter your email address below.

**Email Address**

Please select your name from the below list or select the "not listed" option.

<input type="radio"/> Ed Dude	edude@geewiz.com
<input type="radio"/> Jane Dude	jdude@geewiz.com
<input type="radio"/> Will Dude	wdude@geewiz.com
<input checked="" type="radio"/> My name is not listed	

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Done Internet

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:

Welcome to MySchoolBuilding - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address [http://www.myschoolbuilding.com/myschoolbuilding/msbdefault\\_user.asp?frompage=mytriprequestframe.asp](http://www.myschoolbuilding.com/myschoolbuilding/msbdefault_user.asp?frompage=mytriprequestframe.asp) Go Links

**TD LOGIN**

**Indicates required information.**

**First Name**    
**Last Name**

**Email Address**

Phone Number  Pager

Cellular Phone

Note: This information will be saved after you submit your first request. New users are not saved until their first request has been submitted.

Done Internet

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!

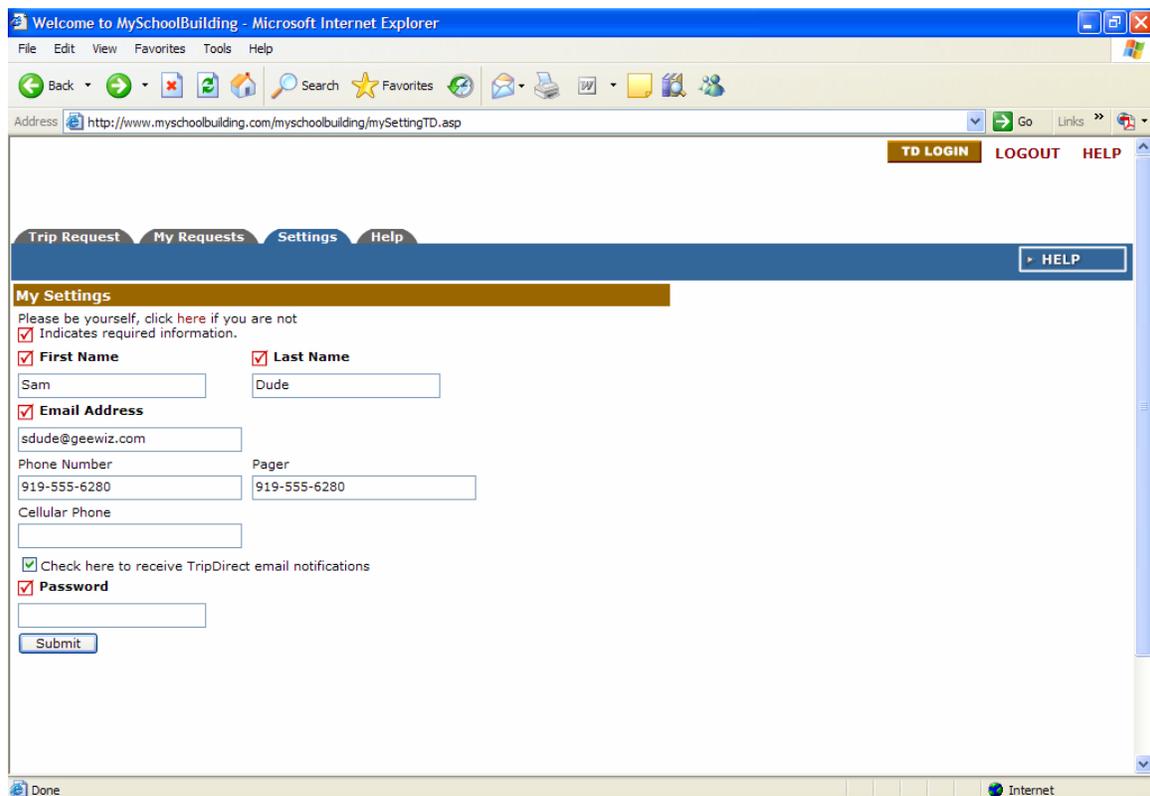


## II. The Settings Page

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 Administrator 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.



The screenshot shows a Microsoft Internet Explorer browser window displaying the 'My Settings' page. The address bar shows the URL: <http://www.myschoolbuilding.com/myschoolbuilding/mySettingTD.asp>. The page has a navigation bar with tabs for 'Trip Request', 'My Requests', 'Settings', and 'Help'. The 'Settings' tab is active. The page content includes a 'My Settings' section with the following fields and options:

- First Name:** Sam
- Last Name:** Dude
- Email Address:** sdude@geewiz.com
- Phone Number:** 919-555-6280
- Pager:** 919-555-6280
- Cellular Phone:** (empty field)
- Check here to receive TripDirect email notifications
- Password:** (empty field)

A 'Submit' button is located at the bottom of the form. The browser's status bar at the bottom shows 'Done' and 'Internet'.

### 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:

- 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) **Cancelled**: 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 principal or the transportation department. 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 in 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.

## 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:

Welcome to MySchoolBuilding - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Recycle Bin Mail Print Internet Options

Address http://www.myschoolbuilding.com/myschoolbuilding/mytriprequestframe.asp Go Links

TD LOGIN LOGOUT HELP

Trip Request My Requests Settings Help HELP

Please be yourself, click [here](#) if you are not Sam Dude  
 Indicates required information.

**Booked By**

<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Email
Sam	Dude	sdude@geewiz.com
<input type="checkbox"/> Phone	<input type="checkbox"/> Pager	<input type="checkbox"/> Cellular
919-555-6280	919-555-6280	

**Booking Details** [Back to Top](#)

Yes, submit for estimate only.

Trip Name

Location -- Select Location --

Organization -- Select Organization --

Trip Package -- Select Trip Package -- [View Trip Package](#)

Departure Date

Return Date

Trip Departure Time

Trip Return Time

**Transportation Type**

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!

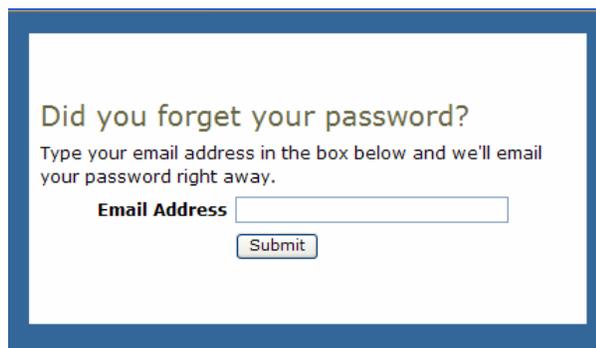
To request a New Trip, follow the steps below, keeping in mind that  indicates a required field:

- **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.



Did you forget your password?

Type your email address in the box below and we'll email your password right away.

Email Address

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:

The screenshot shows a web browser window titled "Welcome to MySchoolBuilding - Microsoft Internet Explorer". The address bar shows the URL: <http://www.myschoolbuilding.com/myschoolbuilding/MyRequests.asp?mode=td>. The page has a navigation menu with "Trip Request", "My Requests", "Settings", and "Help". A "HELP" button is also visible. Below the menu, there is a note: "Note: Once the trip request is assigned to someone for approval, you no longer can edit the request. You can click on the current assigned person name to send email and request changes on your trip request." There is a search bar with the text "Search for ''" and a "Show All" button. Below the search bar, there is a "Print This!" button. The main content area displays a table with the following data:

Trip ID	Status	Active Trip	Package Name	Organization	Total Costs
103	Submitted	No	236 Marching band	Sloan Highschool	\$0.00
<b>Marching Band Orange Bowl Trip</b>	Sloan High School	0	will march in the	Marching Ferrets	\$0.00
12/29/2005 6:00 AM	1/1/2006 11:00 PM	236	Orange ...	Will Dude 919-555-7777	

## 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:

The screenshot shows a Microsoft Internet Explorer browser window with the address bar displaying <http://www.myschoolbuilding.com/myschoolbuilding/mytriprequestframe.asp>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar contains a search icon, a star icon for Favorites, and a Go button. The page content includes a navigation bar with tabs for Trip Request, My Requests, Settings, and Help. A HELP button is located on the right side of this bar. Below the navigation bar, there are links for TD LOGIN, LOGOUT, and HELP. A message reads: "Please be yourself, click [here](#) if you are not Jane Dude". A legend indicates that a red checkmark icon indicates required information. The "Booked By" section contains fields for First Name (Jane), Last Name (Dude), Email (jdude@geewiz.com), Phone (919-555-8888), Pager, and Cellular. The "Booking Details" section includes a "Back to Top" link, a checkbox for "Yes, submit for estimate only.", and fields for Trip Name, Location, Organization, Trip Package, Departure Date, Return Date, Trip Departure Time, and Trip Return Time. The "Transportation Type" section is partially visible at the bottom.

Very bottom of the Trip Request page:

The screenshot shows the footer of the Trip Request page. It includes the SchoolDude.com logo with the text "Powered by: SCHOOLDUDE.com". Navigation links for Trip Request, My Requests, My Settings, and Help are displayed. Below these links are links for Conditions of Use, Privacy Policy, and Help. The footer also contains the copyright notice: "Copyright © 1999-2005 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff".