



Managing Field Trips with PeopleSoft

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Introduction

This document instructs users on how to generate the “Field Trip Checklist Items” that will appear in the student’s to-do list. This process allows HSU students the ability to electronically confirm their acceptance of Humboldt State University’s release of liability waiver form and code of conduct. It is mandatory that students complete the waiver process in order to take part in HSU field trips.

This process begins once a “Field Trip Request” form is turned into the department office by a faculty member. The form should be reviewed for completeness prior to entering any information in PeopleSoft.

The “Field Trip Request Form” should be turned in prior to the start of a new term or at least three days prior to the scheduled field trip departure date. You may download the field trip request form here:

<https://humboldt.edu/forms/node/218>

Prior to departing on a field trip, faculty will need to access their field trip rosters. These rosters are designed to include the following:

- Class List
- Status of field trip waiver form for each student (C=complete, I=incomplete)
- If the student is under 18, a paper release of liability form must be on file. Have the student turn in the form to your department office.
- Emergency contact information for each student. (This information is only displayed if the student has emergency contact information on file. Students submit this information online in their Student Center.

The field trip roster is updated in real time. As students sign their field trip waiver form and update emergency contact information, the roster is updated. It is recommended that faculty members monitor the field trip roster for completeness as the date(s) of the field trip approaches.

Note: There is a “Form Number” column on the field trip roster which corresponds with the number of “Field Trip Request” forms that have been submitted. If two forms have been submitted, there will be two rosters.

Process Overview

Stage 1:



Stage 2:



Creating Field Trips

The first step is to generate the number of field trips that the faculty member requested on the "Field Trip Request Form."

1. Navigate to: Main Menu > Humboldt CS Customization > HUM – Records & Enrollment > Field Trip Authorization > Field Trip Check List



2. Select the Add a New Value tab.

Field Trip Check List

Enter any information you have and click Search. Leave fields blank for a list of all values.



3. Enter the class number as the Run Control ID.

Field Trip Check List



Run Control ID:

4. Select Add

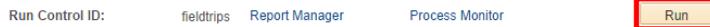


5. Enter the Term, Class Number and Number of Field Trips to add.

Note: If you have already performed this process and are now adding additional field trips, enter the number of additional field trips.

*Term	*Class Nbr	Subject	Nbr	Nbr of Field Trips
1 2144	42542	GEOL	109	3

6. Select Run



7. Select OK on the Process Scheduler Request screen.

Process Scheduler Request

User ID: LM1713 Run Control ID: fieldtrips

Server Name: Run Date: 09/03/2014

Recurrence: Run Time: 8:00:30AM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Field Trip Auth Process	HUMSR105	SQR Process	Web	PDF	Distribution

8. Select Process Monitor

Run Control ID: fieldtrips Report Manager **Process Monitor**

Process Instance: 710873

*Term	*Class Nbr	Subject	Nbr	Nbr of Field Trips
1	2144	42542	GEOL	109

9. Select Refresh until the Run Status indicates Success and the Distribution Status indicates Posted.

Process List Server List

View Process Request For

User ID: LM1713 Type: Last: Days:

Server: PSUNX Name: Instance: to:

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	710873		SQR Process	HUMSR105	LM1713	09/03/2014 8:00:30AM PDT	Success	Posted	Details

10. Proceed to "Adding Field Trip Details."

Adding Field Trip Details

Student's see the details you enter here when electronically signing the release of liability in the Student Center.

1. Navigate to: Main Menu > Humboldt CS Customization > HUM - Records & Enrollment > Field Trip Authorization > Field Trip ChkList Details

Field Trip Authorization

- Authorization Letter Codes
- Authorize Field Trips
- Emergency Contacts
- Field Trip Waiver Form
- Field Trip Check List
- Field Trip ChkList Details
- Field Trip Date Entry
- Field Trip Manual Entry
- Field Trip Class Roster Lookup

2. Enter the Course Number in Description and check Correct History

Search Criteria

Checklist Item Code: begins with

Description: begins with

Include History Correct History Case Sensitive

3. Select Search

Basic Search

- Select the appropriate field trip from the Search Results.

Note: The field trips added most recently will be at the bottom of this list. If you have submitted field trips multiple times, letters will be added to the course number.

Search Results

View All First 1-2 of 2 Last

Checklist Item Code	Description
42542	42542 GEOL 109 10
42542A	42542 GEOL 109 10

- Add the Activity, Activity Dates and Locations for this field trip.

Note: Do not alter any other information on this page.

Checklist Item Table

Checklist Item Code: 42542

Item Code Detail Find | View All First 1 of 3 Last

*Effective Date: 09/02/2014 *Status: Active

*Checklist Code Descr: 42542 GEOL 109 10

Short Description: 42542

Item Association

Comments:

Activity(s): Your Activity Description Here
 Activity Date(s) and Time(s): 9/1/2014 10:00 am - 2:00 pm
 Location(s): Specific Location Here

 To sign the Necessary Waiver form, navigate the this page - Humboldt CS Customization > HUM - Records & Enrollment > Field Trip Authorization > Authorize Field Trips

Save Return to Search Notify Add Update/Display Include History Correct History

- Navigate to the next field trip description until each field trip has a description.

Note: You may also select View All to view the all the Field Trips in the checklist on one screen.

Checklist Item Table

Checklist Item Code: 42542

Item Code Detail Find | View All First 1 of 3 Last

*Effective Date: 09/02/2014 *Status: Active

*Checklist Code Descr: 42542 GEOL 109 10

Show next row (Alt+.)

- Select Save

Save Return to Search Notify Add Update/Display Include History Correct History

Adding Field Trip Dates

The field trip date must be assigned separately so that the University Police Department can easily look up active field trips.

- Navigate to the Field Trip Date Entry page

Field Trip Authorization

- Authorization Letter Codes
- Authorize Field Trips
- Emergency Contacts
- Field Trip Waiver Form
- Field Trip Check List
- Field Trip ChkList Details
- Field Trip Date Entry
- Field Trip Manual Entry
- Field Trip Class Roster Lookup

- Enter Checklist Code followed by the % sign and select search.

Note: The checklist code is typically the CRN. If you have multiple checklists for a CRN, the % sign will ensure that the search returns all the checklists.

Field Trip Date Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Checklist Code: begins with ▼ 24536%
 Subject Area: begins with ▼
 Catalog Nbr: begins with ▼

- Select the appropriate checklist in the Search Results.

Search Results

View All First 1-3 of 3 Last

Checklist Code	Term	Subject Area	Catalog Nbr
24536	2152	REC	220
24536A	2152	REC	220
24536B	2152	REC	220

- Enter the dates for the fieldtrips in the selected checklist.

Note: These dates need to match the dates entered in the description for this trip. They can be entered in any order. The dates represent the days that UPD will be alerted by email that a field trip is taking place.

Checklist Code 24536 Subject Area REC Catalog Nbr 220

Personalize | Find | View All | First 1-3 of 3 Last

Field Trip #	Fieldtrip Date
1	
2	
3	

- Select Save when finished.

Save Return to Search Notify

Manually Confirming Paper Forms are on File

Complete this process if the student has submitted a paper version of the Release of Liability form. This can occur when a student is under 18 or a student submits a paper version of the form in lieu of completing the electronic process.

- Navigate to: Main Menu > Humboldt CS Customization > HUM – Records & Enrollment > Field Trip Authorization > Field Trip Manual Entry

Field Trip Authorization

- Authorization Letter Codes
- Authorize Field Trips
- Emergency Contacts
- Field Trip Waiver Form
- Field Trip Check List
- Field Trip ChkList Details
- Field Trip Date Entry
- Field Trip Manual Entry
- Field Trip Class Roster Lookup

2. Enter the course number under Checklist Code.

Checklist Management - Person

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

ID: begins with []

Sequence Number: = []

Administrative Function: begins with []

Checklist Code: begins with 42542

National ID: begins with []

Campus ID: begins with []

Last Name: begins with []

First Name: begins with []

Case Sensitive

3. Select Search

Note: If a student is listed more than once in the search results, manually complete the checklist for both results.

Search Clear Basic Search Save Search Criteria

4. Type one of the following comments:

- For students under 18: "U18 on file"
- For students 18 and over: "Paper form on file"

Note: Do not alter any other information on this page.

Checklist Management 1 Checklist Management 2

Samuel Smith ID: 012168244

Checklist Date Time: 09/03/2014 12:00:00AM

*Administrative Function: GEN General

*Academic Institution: Humboldt State University

*Checklist Code: 42542 42542

*Status: Initiated Status Date: 09/03/2014

Due Date: 12/19/2014

Due Amount: Currency Code

Comments: U18 on file

5. Select the Checklist Management 2 tab

Checklist Management 1 Checklist Management 2

6. Set Status to Completed

Checklist Management 1 Checklist Management 2

Samuel Smith ID: 012168244

Checklist Date Time: 09/03/2014 12:00:00AM

Administrative Function: General Status: Initiated

Academic Institution: Humboldt State University Status Date: 09/03/2014

Checklist Code: 42542 Due Date: 12/19/2014

*Sequence	*Item	*Status	*Status Date	*Due Date
100	42542	Completed	09/03/2014	12/19/2014

Responsible ID: 011888315 Name: Marx, Laurie Richardson

Override Default Contact

7. Select Save

Save Return to Search Previous in List Next in List Notify Add Update/Display

Viewing the Field Trip Roster

The field trip roster contains the list of students for the class, indicates whether or not they have completed the release of liability and provides emergency contact information.

- Navigate to: Main Menu > Humboldt CS Customization > HUM – Records & Enrollment > Field Trip Authorization > Field Trip Class Roster Lookup



- Enter "field" in begins with



- Select Search



- Select Favorite for the query "FIELD_TRIP_ROSTER_W_CONTACTS_T"

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
FIELD_TRIP_ROSTER_W_CONTACTS_T	Class Roster for Field Trips	Public		HTML	Excel	XML	Schedule	Favorite

- Select HTML in Run to HTML

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Remove
FIELD_TRIP_ROSTER_W_CONTACTS_T	Class Roster for Field Trips	Public		HTML	Excel	XML	Schedule	-

- Enter the Course Number

FIELD_TRIP_ROSTER_W_CONTACTS_T - Class Roster for Field Trips

Enter Class Nbr (CRN):

- Select View Results



- If you wish to download the results, select Excel SpreadSheet

Download results in : **Excel Spreadsheet** CSV Text File XML File (20 kb)

- Reading the roster:

- Completed Form:** C=Complete, I=Incomplete
- Under 18?:** Students who are under 18 will have a "Yes" here
- Forms on File:** Contains the comments added when manually confirming
- Name and Phone:** The presence of this information indicates that an emergency contact has been added.

Form Number	ID	Last	First	Term	Relation	Name	Phone	Under 18?	Completed Form	Forms On File	Class Nbr	Subject	Catalog	Section
1	1			2144	P				I		42542	GEOL	109	10
2	1			2144	P				I		42542	GEOL	109	10

Frequently Asked Questions

<p>1. If I find out there are going to be more field trips than originally planned, can I run this process again?</p>	<p>Yes.</p> <p>If you have already performed this process and are now adding additional field trips, enter the number of additional field trips, not the total number of field trips for the class.</p> <p>Students will be listed once for each time the process was run, both during the manual confirmation process and in the Field Trip Roster. They should be marked as complete each time they are listed.</p>
<p>2. What are Checklists and Checklist Items?</p>	<p>In the context of field trips: Checklists = Collection of field trips for a course Checklist Items = The field trips in that collection</p>
<p>3. What is a Run Control ID?</p>	<p>A Run Control ID can be any number or word. It does not have significance in this process.</p>
<p>4. Can I create the field trips and fill in the descriptions later?</p>	<p>Field trips appear in the student center immediately after being created and before the trip descriptions are added. It is therefore important to add the trip descriptions as quickly as possible after creating the field trips.</p>
<p>5. Can I have separate rosters for each trip?</p>	<p>Generally no, but it is possible with extra work. If you would like separate comments, authorization or rosters for each trip, you will need to create the checklists one at a time. Each trip will then show as a different form number in the roster.</p>
<p>6. Can I create placeholders for future field trips if the details are unknown?</p>	<p>When a student electronically completes the Release of Liability, they are authorizing specific dates and locations. If the date or location is unknown, or has changed significantly after a student has completed the Release of Liability, a new field trip should be added and the student should again be asked to complete the Release of Liability.</p> <p>Please contact Risk Management for clarification on a specific situation.</p>
<p>7. If the details of a field trip change or a trip is canceled, can I edit the description to reflect this?</p>	<p>Please see above.</p>