

HOW TO ORGANIZE YOUR TRIPS WITH

SCANTRIP

+

SCANBOARD

A BRIEF MANUAL



1.

ORGANIZATION

The ScanTrip app and its companion app ScanBoard were developed to help organize complex trips with many passengers, vehicles and itineraries.

You use ScanTrip to configure the trips: passengers, vehicles and itineraries. Then you send a link (invitation) to other people who will help in the process of embarking and disembarking passengers from the trip's vehicles. The invitation link gives permission for embarking passengers on a trip using the companion app ScanBoard.

The reason there are two apps is because users only need to pay for ScanTrip; ScanBoard is free.

ScanTrip has four tabs:

- **Home tab:** general information (registration, app configuration)
- **Trips tab:** create and configure a trip. A trip is composed of passengers, itineraries and the vehicles used used in the trip. Each passenger is associated with a QR code that can be used to embark/disembark passengers in a vehicle.
- **Embarks tab:** used to embark passengers in a vehicle. You embark passengers using the camera (pointing to a QR code) or manually from a list of passengers.
- **Dashboard tab:** see the status of the trip, for each itinerary and vehicle. You can see the current position of vehicles in a map after embarking has started.

2.

STEP BY STEP

Let's start by creating a trip. You do that using the Trips tab.

TRIPS TAB

To go to the Trips tab tap on the Trips icon () at the bottom of the screen.

The Trips tab initially shows a list of all trips. You can sort the list by name or label tapping the button () at the top of the screen.

To create a trip, tap on the **+** button at the top of the screen. A form will appear, with the following fields:

- Name
- Label
- Date

Fill the fields and tap the button “Save”.

In the list of trips, tap on one trip to go to the “Trip details” screen. This screen shows the details of the trip:

- Name, label, date
- List of passengers
- List of vehicles
- List of itineraries
- Tools for the trip

After creating a trip, you must configure the trip. On the trip list, tap on the trip; you will be taken to the Trip Detail Screen on the Edit button on top of the screen. A form will appear, where you can edit the trip details.

REGISTERING THE TRIP PASSENGERS

To register passengers for the trip, tap on the button “Passengers”.

The Passengers screen initially shows a list of all registered passengers. You can sort the list by name or label tapping the button  on top of the screen.

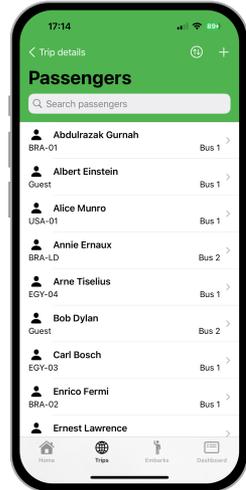
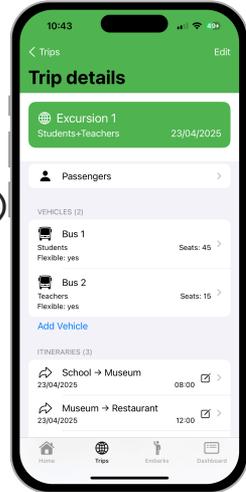
You can register passengers one by one using a form, or by uploading a spreadsheet file containing the passengers data.

To register one passenger, tap on the  button at the top of the screen. A form will appear, containing the following fields:

- *Name*: the passenger name
- *Label*: a label for the passenger (Contestant, Leader, Guest, etc.)
- *Identification*: a unique id for the passenger (numeric or alphanumeric)

To register passengers using a spreadsheet file, tap and hold the  button, then choose "Import from file" from the menu. The file must be in CSV format and must contain the following columns, in order:

- First name
- Last name



- Label
- ID

In the list of passengers, tap on one passenger to go to the "Passenger details" screen. This screen shows the name and label of the passenger and the trips it participates.

If you want to edit the passenger details, tap on the button Edit. In the "Edit passenger" screen you can edit the name, label and identification for the passenger. You can also specify the trips in which this passenger participates. To specify the passengers' trips tap on the button "Select Trips" and choose the trips from the list of existing trips.

ADDING A VEHICLE

To add a vehicle to the trip, tap the button "Add Vehicle" at the bottom of the vehicles list in the "Trip Edit" screen. A form will appear, with the following fields:

- Name
- Label
- Number of seats
- Flexible Vehicle

Flexible passengers are passengers that are not allocated to any specific vehicle. A flexible passenger can embark on any **flexible vehicle**.

Non-flexible passengers are allocated to specific vehicles (and these vehicles are called non-flexible).

The idea is that users can choose if they want to determine which bus each passenger must embark on (using non-flexible vehicles), or if passengers can embark on any vehicle they want that have available places (flexible vehicles).

In the same trip you can have a mix of flexible and non-flexible vehicles.

For a non-flexible vehicle, you must specify the passengers for the vehicle, tapping on the button “Select passengers”.

After you create a vehicle, if you need to edit the vehicle data tap on the vehicle in the vehicles list in the “Trip edit” screen.

ADDING AN ITINERARY

An itinerary is a section of a trip (for example, “hotel to venue”, or “venue to dinner”). To add an itinerary to the trip, tap the button “Add Itinerary” at the bottom of the itineraries list in the “Trip edit” screen. A form will appear, with the following fields:

- From
- To
- Date and time

After creating an itinerary, if you need to edit it, tap on the itinerary in the itineraries list in the “Trip edit” screen.

BEFORE THE TRIP

In the "Trip details" screen ScanTrip offers several tools to related to trips:

- **Check the trip:** check if the trip configuration is consistent (e.g, if there are enough places in the vehicles for all passengers).
- **QR code labels:** generate QR codes for the trips' passengers in the form of sticky labels. You can print and stick the labels in the passengers badges.
- **QR code images:** generate QR codes for the trips' passengers in the form PNG images in a compressed

archive file. You can use the images to produce badges for the passengers that include QR codes.

- **Passenger list:** a PDF file containing the list of passengers of the trip passengers, with respective vehicle allocation.
- **Invite Embarkers:** create a link to be sent to other persons which will help embark passengers in vehicles, using the companion app ScanBoard. Embarkers using ScanBoard can only embark passengers, they cannot alter any other trip data.

EMBARKS TAB

To go to the Embarks tab tap on the Embarks icon on the bottom of the screen.

Embarking passengers is the same in ScanTrip and ScanBoard apps.

Before embarking passengers you must have your “display name” defined. The display name is a name that identifies the person who embarked the passengers, and will appear on reports and on the dashboard. To edit the display name go to the “Home tab” and tap on “Edit display name”.

EMBARKING PASSENGERS

The first screen in the Embarks tab shows the list of trips. Tap on a trip to select it.

The second screen in the Embarks tab shows the list of itineraries for the selected trip. Tap on an itinerary to select it.

The third screen in the Embarks tab shows a list of vehicles for the selected trip. Tap on a vehicle to select it.

With trip, itinerary and vehicle selected, you can start embarking passengers.

The screen shows six colored buttons. When all six buttons turn green, this itinerary has completed.

- **Expected:** this button shows the number of expected passengers. If pressed, it shows the list of the expected passengers. This button is initially green.

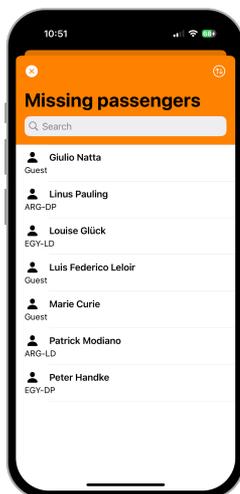
- **Embarked:** this button shows the number of passengers already embarked. If pressed, it shows the list of the embarked passengers. This button is initially blue; it turns green when all passengers are embarked.

- **Missing:** this button shows the number of missing passengers (passengers expected minus passengers embarked). If pressed, it shows the list of the missing passengers. This button is initially red; it turns green when all passengers are embarked.

- **Started:** this button is initially grey. Press this button when embarking has started. The button turns green and shows the time the embarking started.

- **In transit:** this button is initially grey. Press this button when embarking passengers finished and the vehicle is moving towards the itinerary destination. The button turns green and shows the time the vehicle started moving.

- **Arrived:** this button is initially grey. Press this button when the vehicle arrived at the itinerary destination. The button turns green and shows the time the vehicle arrived.



The Embarking screen has also two tools for embarking passengers:

Embark manually: allows the user to embark/disembark a set of passengers by selecting the passengers from the list of vehicle passengers.

Embark with QR code: uses the camera to scan the QR codes in passenger badges.

DASHBOARD TAB

Use the Dashboard tab to see the status of the trip. For each itinerary, it shows the status for each vehicle, with six buttons, similar to the status described in the Embarks tab (Expected passengers, Embarked passengers, Missing passengers, Started, In transit and Arrived).

You can see the position of any vehicle in a map, tapping on the icon  of the vehicle. You can see all vehicles for the itinerary in a map tapping on the icon  at the top of the screen.

