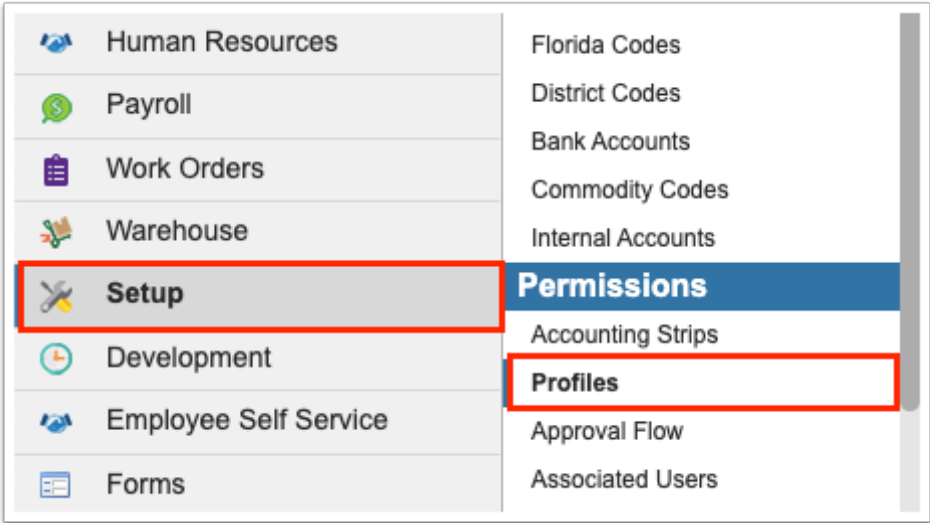


Field Trip Request

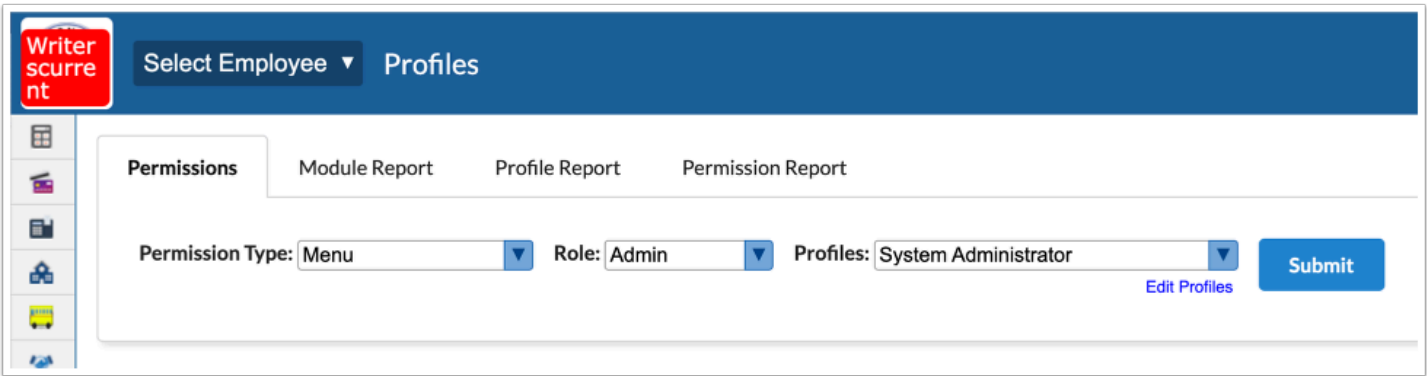
The Field Trip Request module allows users to submit field trip requests, review their submitted requests and the status of the requests. Users part of the approval chain can review and approve requests as well as review Approval History. This module also allows users to assign drivers and complete the field trip containing all billing and allocation information for transportation.

Profile Permissions

1. From the **Setup** menu, click **Profiles**.



2. The Profiles screen defaults to the **Permissions** tab.



3. Select **Menu** from the **Permission Type** pull-down.

Permissions

Module Report

Profile Report

Permission Report

Permission Type: Menu

Role: Admin

Profiles: System Administrator

Submit

Edit Profiles

4. Select the **Role** from the pull-down, such as Admin.
5. Select the applicable **Profiles** from the pull-down.
6. Click **Submit**.
7. Click the **Transportation** tab.

Permissions

Module Report

Profile Report

Permission Report

Permission Type: Menu

Role: Admin

Profiles: System Administrator

Submit

Edit Profiles

Find

Portal

Budgeting/General Ledger

Purchasing/Accounts Payable

Accounts Receivable

Fixed Assets

Transportation

Human Resources

Field Trips

View

Field Trip Request

Close Fieldtrips

Reopen Fieldtrips

View All Fieldtrips

Print/Email Fieldtrips

Edit Fieldtrips

Negative Budgets

Allow Final Destination / Date Edit

Cancel Approved Field Trips


Can Edit Approved Field Trips

Internal Field Trip Request

Close Fieldtrips

Reopen Fieldtrips

8. Select the **View** check box for the applicable Field Trip Request permissions.

<div>Find </div> <div>Portal</div> <div>Budgeting/General Ledger</div> <div>Purchasing/Accounts Payable</div> <div>Accounts Receivable</div> <div>Fixed Assets</div> <div>Transportation</div> <div>Human Resources</div> <div>Payroll</div>	<table border="1"> <thead> <tr> <th colspan="2">Field Trips</th> <th>View <input type="checkbox"/></th> </tr> </thead> <tbody> <tr> <td colspan="2">Field Trip Request</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Close Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Reopen Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>View All Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Print/Email Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Edit Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Negative Budgets</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Allow Final Destination / Date Edit</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Cancel Approved Field Trips</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Can Edit Approved Field Trips</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td colspan="2">Internal Field Trip Request</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Close Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Reopen Fieldtrips</td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Field Trips		View <input type="checkbox"/>	Field Trip Request		<input checked="" type="checkbox"/>	Close Fieldtrips		<input checked="" type="checkbox"/>	Reopen Fieldtrips		<input checked="" type="checkbox"/>	View All Fieldtrips		<input checked="" type="checkbox"/>	Print/Email Fieldtrips		<input checked="" type="checkbox"/>	Edit Fieldtrips		<input checked="" type="checkbox"/>	Negative Budgets		<input checked="" type="checkbox"/>	Allow Final Destination / Date Edit		<input type="checkbox"/>	Cancel Approved Field Trips		<input type="checkbox"/>	Can Edit Approved Field Trips		<input type="checkbox"/>	Internal Field Trip Request		<input checked="" type="checkbox"/>	Close Fieldtrips		<input checked="" type="checkbox"/>	Reopen Fieldtrips		<input checked="" type="checkbox"/>
Field Trips		View <input type="checkbox"/>																																									
Field Trip Request		<input checked="" type="checkbox"/>																																									
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Close Fieldtrips		<input checked="" type="checkbox"/>																																									
Reopen Fieldtrips		<input checked="" type="checkbox"/>																																									

Field Trip Request: Select the **View** check box to enable permission to the Field Trip Request screen.

Close Fieldtrips: Select the **View** check box to gives users the ability to close/complete field trips clicking the **Complete Collection** button from the [Complete Field Trip](#) tab.

Reopen Fieldtrips: Select the **View** check box to give users the ability to reopen field trips that have been closed/completed. When enabled, users can click the **Uncomplete Collection** button to reverse the collection of funds to be made from the school to transportation on the [Complete Field Trip](#) tab.

View All Fieldtrips: Select the **View** check box to allow users to view all users' drafts, templates, and submitted requests by selecting the **View All Users** check box displayed on the Drafts, Templates, and Field Trip History tabs.

Print/Email Fieldtrips: Select the **View** check box to allow users to print and email field trips.

Edit Fieldtrips: Select the **View** check box to allow users to create and edit field trips.

Negative Budgets: Select the **View** check box to allow users to use negative budget as [Allocations](#) for field trips.

Allow Final Destination / Date Edit: Select the **View** check box to allow users to enter and edit the Final Destination field as well as the Date field.

Cancel Approved Field Trips: Select the **View** check box to allow users to Cancel approved field trips from the [Field Trip History](#) tab.

Can Edit Approved Field Trips: Select the **View** check box to allow users to make edits to an already approved field trip.

9. Click **Save**.

Field Trips	View
Field Trip Request	<input checked="" type="checkbox"/>
Close Fieldtrips	<input checked="" type="checkbox"/>
Reopen Fieldtrips	<input checked="" type="checkbox"/>
View All Fieldtrips	<input checked="" type="checkbox"/>
Print/Email Fieldtrips	<input checked="" type="checkbox"/>
Edit Fieldtrips	<input checked="" type="checkbox"/>
Negative Budgets	<input checked="" type="checkbox"/>
Allow Final Destination / Date Edit	<input checked="" type="checkbox"/>
Cancel Approved Field Trips	<input checked="" type="checkbox"/>
Can Edit Approved Field Trips	<input checked="" type="checkbox"/>

 See [Profiles](#) for more information.

Creating a Field Trip Request Draft

1. In the **Transportation** menu, click **Field Trip Request**.

- Budgeting/General Ledger
- Purchasing/Accounts Payable
- Accounts Receivable
- Fixed Assets
- Transportation**
 - Field Trip Request**
 - Internal Field Trip Request
 - Outside Field Trip Request
 - Setup
- Human Resources
- Payroll
- Work Orders

2. From the Drafts tab, you can create a new field trip draft as well as continue editing Existing Drafts. Before continuing, be sure the correct fiscal year is selected from the pull-down; it defaults to the current year.

Writer's current

Select Employee ▼ Field Trip Request

Lizette Vigil SIS ERP

Drafts Templates Field Trip History Current Field Trip

2022 - 2023

Create a Field Trip Request

Create

Existing Drafts

Hide All Users All Facilities

Export Filter: OFF

Name	Type	Created Date	User	
Lizette A	District	08/05/2022	Lewis	Duplicate View
FHS to Owl Bay 11/4 FB	District	08/05/2022	Thompson	Duplicate View
FHS to Owl Bay 11/4 CH	District	08/05/2022	Thompson	Duplicate View
FMS - AFTERSCHOOL PROGRAM (OCTOBER)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (NOVEMBER)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (DEC)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (JANUARY)	District	08/26/2022	Lemus	Duplicate View

3. To create a new draft, start by entering a field trip request name in the provided text box. Then, click **Create**.

Writer's current

Select Employee ▼ Field Trip Request

Drafts Templates Field Trip History Current Field Trip

Create a Field Trip Request

Field Trip Zoo Create

Existing Drafts

Hide All Users All Facilities

Export Filter: OFF


Name	Type	Created Date
Lizette A	District	08/05/2022
FHS to Owl Bay 11/4 FB	District	08/05/2022

General Field Trip Information

Upon clicking Create, you will be taken to the Current Field Trip tab where additional details can be entered and the request can be submitted.

The trip **Number** is assigned automatically. The **Field Trip Status** updates automatically as well. The **Creator** lists your name, and the **Created Date** displays as the date the draft was created.

1. Select the **Requesting Facility** from the pull-down.
2. If a specific organization is sponsoring the field trip and has been registered (recorded in [Setup](#)), select the **Sponsoring Organization** from the pull-down.
3. Enter the **Date** the field trip is supposed to take place.
4. If the field trip is **Recurring**; i.e. if the same trip will take place on more than one occasion, select the corresponding check box. Upon selecting this check box, the Date text box is replaced by **Date Range** text boxes.

 You can continue and complete the General Information section manually; however, these fields will be auto-populated once you generate a trip in the [Pick-Ups/Drop-Offs](#) section.

5. Enter the number of students who are expected to attend the field trip in the **# of Students** text box.
6. Enter the number of adults who are expected to attend the field trip in the **# of Adults** text box.

7. Enter the number of students who are in wheelchairs who are to attend the field trip in the **# of Wheelchairs** text box.
8. Enter the number of bus aides that are required to attend the trip, if applicable, in the **# of Bus Aides** text box.
9. The **# of Buses** needed automatically populates based on the # of Students entered but can be edited as needed.
10. Enter the number of bus drivers needed from the **Driver Pool** to identify if you need a district provided driver.
11. Enter the number of **School Provided Drivers** needed; entering a number here identifies if you are using a school provided driver, such as a Coach of a traveling team.
12. Enter the **# of Star Seats** (infant seats) needed for the trip, if applicable.
13. Enter your username for your school email address in the **Requested By** text box in order to receive emailed updates regarding the request. The domain is set up by default.
14. Enter the name of the **Pick Up Contact** at the requesting facility.
15. Select the **Final Destination** from the pull-down.

If the applicable destination is not present on the pull-down, click the **green plus sign** to Add Field Trip Facility to the list.

Name	Code	Address 1	Address 2	City	State	Zipcode	Phone	Email
Zo								

16. Enter the **Estimated Trip Miles** in the provided text box.
17. Select the **Are To Go Lunches Required?** check box if the student require a lunch for the trip.
 - a. If the check box is selected, you can also select the **Cafeteria Manager Notified** check box to indicate that the manager has been informed of the trip.
 - b. Enter the **Number of Lunches** required.
18. When all information has been entered/selected, click the **Generate** button.

Drafts
Templates
Field Trip History
Current Field Trip
2022 - 2023

Field Trip Zoo

Number
5226

Field Trip Status
Unsubmitted

Field Trip Type

Creator
Vigil, Lizette

Created Date
07/03/2023

Submitted Date

Requesting Facility
0031 FOCUS HI...

Sponsoring Organization
Academics

Date
08/20/2023

Recurring
☐

of Students
20

of Adults
3

of Wheelchairs

of Bus Aides
1

of Buses
1

Requested By
lizette
@ir...s.org

Pick Up Contact
Lizette G

Final Destination
TBRZ BREVARD...

Estimated Trip Miles
25

Are To Go Lunches Required?
☐

Pick-Ups/Drop-Offs
Generate

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
													Departure
Total Time: 0:00 Est Cost: \$0.00													

Pick-Ups/Drop-Offs

Upon clicking Generate, the Generate Locations pop-up displays where you can enter additional details about the field trip.

Generate Locations

Date Range
Field Trip Date 08/20/2023

Locations

School

Location:
Code:

Description:

Students:
Adults:
Wheelchairs:
Bus Aides:

Add Additional Location
Delete Additional Location

Destination

Location:
Code:

Description:

One Way Distance:
Miles
Estimate
Map

Are To Go Lunches Required? ☐ Number Of Lunches:

Cafeteria Manager Notified? ☐

Times

Departure

Pick-Up School:
Drop-Off Destination:

Return

Pick-Up Destination:
Drop-Off School:

The information required here varies depending on the information entering previously, such as whether the field trip is recurring or not.

1. Enter or adjust the **Date Range**, as needed.

2. For recurring field trips, select how often the trip occurs from the **Recurs Every** pull-down, such as every Week, 2 Weeks, or Month. Then, select the **Recurring Days** from the pull-down, such as every 2 Weeks on Wednesday.
3. Enter the requesting school's information starting with the school's **Location** for pick-up, such as Bus Loop.
4. Next, select the facility **Code** from the pull-down. If the school's code is not present, you can click the green plus sign to Add Field Trip Facility.
5. If an additional description is required for the pick-up location, enter details in the **Description** text box.
6. Enter the number of students attending the trip in the **# Students** text box.
7. Enter the number of adults attending the trip in the **# Adults** text box.
8. Enter the number of students who are in wheelchairs who are to attend the field trip in the **# Wheelchairs** text box.
9. Enter the number of bus aides that are required to attend the trip, if applicable, in the **# Bus Aides** text box.
10. If there are multiple locations from which students are to be picked up for the field trip, click **Add Additional Location**. Once clicked, you will see each additional location listed.

Locations

School
 Location: Code:

Description:

Students: # Adults: # Wheelchairs: # Bus Aides:

Additional Location 1
 Location:



Description:

Students: # Adults: # Wheelchairs: # Bus Aides:

To remove any added locations, click **Delete Additional Location**.

11. Enter the field trip destination information starting with the destination's **Location** for drop-off, such as Zoo Parking Lot B.
12. Next, select the destination **Code** from the pull-down. If the destination's code is not present, you can click the green plus sign to Add Field Trip Facility.
13. If an additional description is required for the drop-off location, enter details in the **Description** text box.
14. Enter the **One Way Distance** in Miles in the provided text box.

Destination

Location: Code:  

Description:

One Way Distance Miles

Are To Go Lunches Required? ☐ Number Of Lunches

Click **Estimate** to auto-calculate the miles based on the Locations entered.

Click **Map** to open Google Maps in order to determine the distance of the trip in miles.

15. Select the **Are To Go Lunches Required?** check box if the student require a lunch for the trip.

16. Enter the **Number of Lunches** required.

17. Select the **Cafeteria Manager Notified** check box to indicate that the manager has been informed of the trip.



18. Select the **Star Seats Required?** check box if infant seats are required for the trip. Then, enter the **Number of Star Seats?** needed.

19. Enter the number of bus drivers needed from the **Driver Pool** to identify if you need a district provided driver.

20. Enter the number of **School Provided Drivers** needed; entering a number here identifies if you are using a school provided driver, such as a Coach of a traveling team.

21. If the field trip is an **Overnight Trip**, select the corresponding check box.

Destination

Location: Code:  

Description:

Are To Go Lunches Required? ☒ Number Of Lunches

Cafeteria Manager Notified? ☐

☐ Overnight Trip

☐ No Return Trip

Times

Departure

Pick-Up School:

Drop-Off Destination:

Return

Pick-Up Destination:

Drop-Off School:

22. If the field trip is a **No Return Trip**, select the corresponding check box.

23. Enter the time of pick-up from the original location (the school) in the **Pick-Up School** text box. Enter the time the bus should arrive at the destination in the **Drop-Off Destination** text box.

24. Enter the return time of pick-up in the **Pick-Up Destination** text box. Enter the time the bus should arrive back at the school in the **Drop-Off School** text box.

25. When all information has been entered/selected, click **Generate**. You also have the option to click **Cancel** to close the pop-up window and return to the Current Field Trip tab.

26. Once you click Generate, the Pick-Ups/Drop-Offs section auto-populates based on the information entered in the Generate Locations pop-up. The information displayed here can be edited as needed. Click any of the blue underlined text fields or pull-downs to make changes.

Pick-Ups/Drop-Offs

Generate

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
<div>−</div>	08/20/2023	09:00 am	0031 ... <div>▼</div> <div>+</div>	Loop	08/20/2023	09:40 am	TBRZ ... <div>▼</div> <div>+</div>	Front Entrance	20	3		1	Departure <div>▼</div>
<div>−</div>	08/20/2023	02:00 pm	TBRZ... <div>▼</div> <div>+</div>	Exit	08/20/2023	02:40 pm	0031 F... <div>▼</div> <div>+</div>	Parking Lot B	20	3		1	Return <div>▼</div>
<div></div>	<div></div>	<div></div>	<div></div> <div>▼</div> <div>+</div>	<div></div>	<div></div>	<div></div>	<div></div> <div>▼</div> <div>+</div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	Departure <div>▼</div>
Total Time: 5:40 Est Cost: \$340.00													

Below the table displays the **Total Time** of the trip as well as the **Est[imated] Cost** of the trip.

27. You can add more pick-up and drop-off information by using the last row of the table and pressing the Enter key when all data has been entered or you can click Generate to add information via the Generate Locations pop-up.

Pick-Ups/Drop-Offs

Generate

	Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
<div><div></div><div></div></div>		08/20/2023	09:00 am	0031 ...	Loop	08/20/2023	09:40 am	TBRZ ...	Front Entrance	20	3		1	Departure
		08/20/2023	02:00 pm	TBRZ...	Exit	08/20/2023	02:40 pm	0031 F...	Parking Lot B	20	3		1	Return
														Departure
Total Time: 5:40 Est Cost: \$340.00														

28. To delete the computed pick-up and drop-off location and times, click the **delete** button (red minus sign).

Allocations

1. Select the account that will be allocated from the school (requesting facility) to the transportation department. Select the applicable elements from the pull-downs, such as Facility, Fund, Function, etc. The elements displayed depend on the district.
- If a Sponsoring Organization is selected, the Fund and Function fields auto-populate based on the selection made and cannot be modified; all remaining elements can be edited as needed.

Allocations												
Facility	Department	Fund	Function	Object	Project	Program	Budgeted	Committed	Encumbered	Expended	Balance	Amount
0291 ...	00: UNAS...	100: ...	7823: ...	3310 ...	1999 ...		11,842.50	7,012.50	147.50	0.00	4,682.50	195.00
											Total	195.00

2. When all elements have been selected, enter the **Amount** to be paid from this account towards the trip. The amount defaults to the estimated trip cost but can be edited as needed in order to split the cost between different accounts.
3. When the accounting strip has been selected and the Amount has been entered, while clicked into a text box, press the **Enter** key to commit the line of data. The line will turn blue and the delete button will display when the line has saved.
- Once the line has been committed, the **Budgeted, Committed, Encumbered, Expended,** and **Balance** columns automatically populate based on account information. These columns will automatically update as the trip is completed and the money is expended.
4. Add as many accounts as needed until the total cost of the trip is covered.

Finalizing the Field Trip Request

1. Attach any applicable Files in the corresponding section. As indicated in the Files section, drag files directly into the box to attach documents or click the **Select** button to browse for files. Click the **Scan File** button for direct scanning; this will prompt you to download Dynamsoft. This is a one-time download that allows you to attach files directly from your scanner. In doing so, you will bypass saving the file to your computer first.

The screenshot shows the 'Files' and 'Comments' section of the form. The 'Files' section has a header with '(Drag files to upload)', a 'Select' button, and a 'Scan File' button. Below it is a large white box for file uploads. The 'Comments' section has a header, a large white text area for comments, and a 'Post' button at the bottom right. In the top right corner of the form, there are 'Print Unofficial' and 'Submit' buttons.

2. Post any necessary comments. The comments left here are for internal use only, meaning only other staff members will have access. To add a comment, simply type the comment in the white text field. Then, click the **Post** button.

3. To **Submit** the field trip request, click the corresponding button. Once submitted, the field trip request displays on the Field Trip History tab. For more information about field trip history, see the [Field Trip History](#) section.

The screenshot shows the 'Pick-Ups/Drop-Offs' and 'Allocations' sections of the form. The 'Pick-Ups/Drop-Offs' section has a header with 'Generate' and a table with columns: Description, Pick-Up Date, Pick-Up Time, Pick-Up Facility, Pick-Up Location, Drop-Off Date, Drop-Off Time, Drop-Off Facility, Drop-Off Location, # Students, # Adults, # WheelChairs, and # Bus. The table contains two rows of data for pick-ups and drop-offs on 08/20/2023. Below the table is a summary row showing 'Total Time: 5:40' and 'Est Cost: \$340.00'. The 'Allocations' section has a header and a table with columns: Facility, Department, Fund, Function, Object, Project, Program, Budgeted, Committed, Encumbered, Expended, Balance, and Amount. The table contains two rows of data for allocations, with a total row at the bottom showing 'Total' and '340.00'. At the bottom of the form, there are 'Files', 'Comments', 'Print Unofficial', and 'Submit' buttons. The 'Submit' button is highlighted with a red box.

From this screen, you can also **Print Unofficial** documentation by clicking the corresponding button.

Allocations

Project ▴	Program ▴	Budgeted	Committed	Encumbered	Expended	Balance	Amount
1547 : ... ▾							340.00
1547 : ... ▾		600.00	603.28	0.00	20.00	-23.28	340.00
Total							340.00

Post

Print Unofficial Submit

Help

Logout

- a. To print, click the **printer** icon located in the upper right corner of the screen.
- b. Click the **down arrow** to download the image as a PDF file.

Modules.php

1 / 1 | 100% +

Field Trip Zoo

2023-07-03

Field Trip Request

Number	Creator	Created Date	Date Range	Recurring
5226	Vigil, Lizette	2023-07-03	2023-08-20 – 2023-08-20	No
Field Trip Status	# of Students	# of Adults	# of Wheelchairs	# of Buses
U	20	3		1

Locations

Pick Up				Drop Off			
Date	Time	Facility	Location	Date	Time	Facility	Location
2023-08-20	09:00 am	0031 FOCUS HIGH SCHOOL	Loop	2023-08-20	09:40 am	TBRZ BREVARD ZOO	Front Entrance
2023-08-20	02:00 pm	TBRZ BREVARD ZOO	Exit	2023-08-20	02:40 pm	0031 FOCUS HIGH SCHOOL	Parking Lot B

Allocations

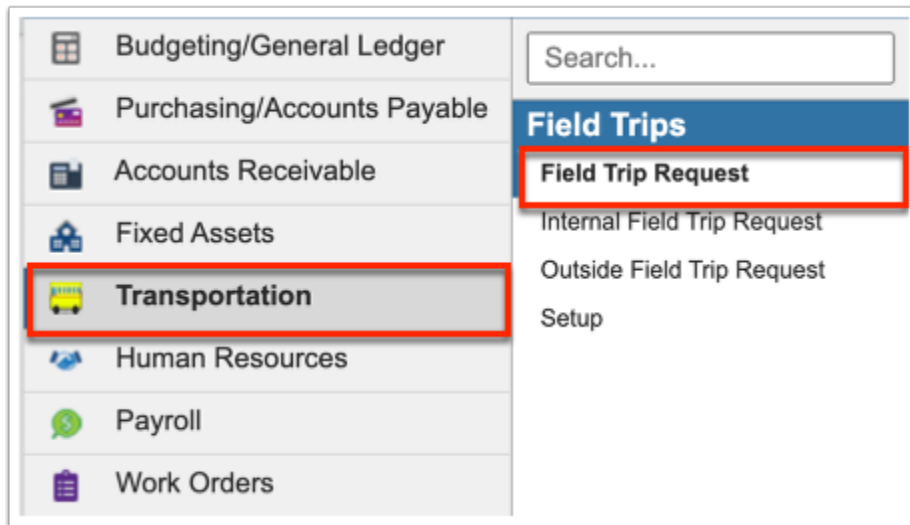
Facility	Department	Fund	Function	Object	Project	Program	Amount
----------	------------	------	----------	--------	---------	---------	--------

Field Trip Request

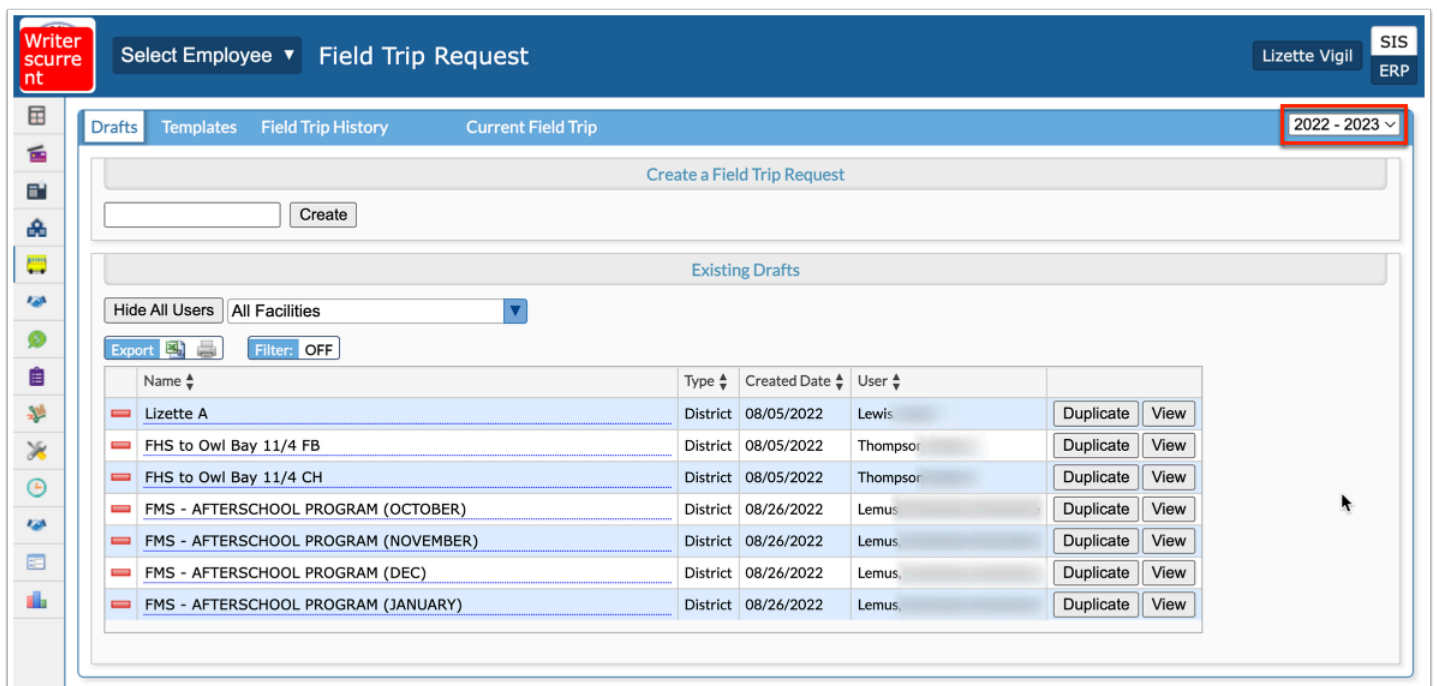
Page 14

Viewing Existing Field Trip Drafts

1. In the **Transportation** menu, click **Field Trip Request**.



2. From the Drafts tab, you can create a new field trip draft as well as continue editing Existing Drafts. Before continuing, be sure the correct fiscal year is selected from the pull-down; it defaults to the current year.



3. To **View All Users** who have started a draft, click the corresponding button. Note: Only select users have permission to view all users' drafts.

Drafts
Templates
Field Trip History
Current Field Trip

Create a Field Trip Request

Create

Existing Drafts

View All Users
All Facilities

Export
Filter: OFF

Name	Type	Created Date	
Field Trip Zoo	District	07/03/2023	Duplicate View

a. Upon viewing all users' drafts, you can **Hide All Users** to display only your own drafts again.

Existing Drafts

Hide All Users
All Facilities

Export
Filter: OFF

Name	Type	Created Date	User	
Lizette A	District	08/05/2022	Lewis	Duplicate View
FHS to Owl Bay 11/4 FB	District	08/05/2022	Thompson	Duplicate View
FHS to Owl Bay 11/4 CH	District	08/05/2022	Thompson	Duplicate View
FMS - AFTERSCHOOL PROGRAM (OCTOBER)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (NOVEMBER)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (DEC)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (JANUARY)	District	08/26/2022	Lemus	Duplicate View

4. To view drafts applicable to a specific facility, select the facility from the provided pull-down. The pull-down defaults to All Facilities.

Existing Drafts

Hide All Users All Facilities

Export Filter: OFF

Name	Type	Created Date	User	
Lizette A	District	08/05/2022	Lewis	Duplicate View
FHS to Owl Bay 11/4 FB	District	08/05/2022	Thompson	Duplicate View
FHS to Owl Bay 11/4 CH	District	08/05/2022	Thompson	Duplicate View
FMS - AFTERSCHOOL PROGRAM (OCTOBER)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (NOVEMBER)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (DEC)	District	08/26/2022	Lemus	Duplicate View
FMS - AFTERSCHOOL PROGRAM (JANUARY)	District	08/26/2022	Lemus	Duplicate View

5. From the Existing Drafts section, you can edit the Name of the drafts by clicking in the **Name** text box and making changes as needed.

Hide All Users All Facilities

Export Filter: OFF

Name	Type	Created Date
Lizette Garcia	District	08/05/2022
FHS to Owl Bay 11/4 FB	District	08/05/2022
FHS to Owl Bay 11/4 CH	District	08/05/2022
FMS - AFTERSCHOOL PROGRAM (OCTOBER)	District	08/26/2022
FMS - AFTERSCHOOL PROGRAM (NOVEMBER)	District	08/26/2022
FMS - AFTERSCHOOL PROGRAM (DEC)	District	08/26/2022
FMS - AFTERSCHOOL PROGRAM (JANUARY)	District	08/26/2022
Field Trip Zoo	District	07/03/2023

6. To view the draft in order to edit or submit the field trip request, click the **View** button. Clicking View takes you to the Current Field Trip tab. For more information on completing a Field Trip Request, see [Creating a Field Trip Draft](#). Click the **Drafts** tab to return to the drafts.

Drafts
Templates
Field Trip History
Current Field Trip

Create a Field Trip Request

Existing Drafts

View All Users

All Facilities

Export

Filter: OFF

Name	Type	Created Date	
Field Trip Zoo	District	07/03/2023	<input type="button" value="Duplicate"/> <input type="button" value="View"/>

Drafts
Templates
Field Trip History
Current Field Trip

2022 - 2023

Field Trip Zoo

Number

Field Trip Status

Field Trip Type

Creator

Created Date

Submitted Date

Requesting Facility

Sponsoring Organization

5226

Unsubmitted

Vigil, Lizette

07/03/2023

0031 FOCUS HI...

Academics

Date

Recurring

08/20/2023

☐

of Students

of Adults

of Wheelchairs

of Bus Aides

of Buses

20

3

1

1

Requested By

Pick Up Contact

Final Destination

Estimated Trip Miles

Are To Go Lunches Required?

lizette

Lizette

TBRZ BREVARD...

25

☐

@ls.org

Pick-Ups/Drop-Offs

Generate

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
	08/20/2023	09:00 am	0031 ...	Loop	08/20/2023	09:40 am	TBRZ ...	Front Entrance	20	3		1	Departure
	08/20/2023	02:00 pm	TBRZ...	Exit	08/20/2023	02:40 pm	0031 F...	Parking Lot B	20	3		1	Return
													Departure
Total Time: 5:40 Est Cost: \$340.00													

7. To create a copy of an existing draft, click the **Duplicate** button.

Drafts | Templates | Field Trip History | Current Field Trip

Create a Field Trip Request

Create

Existing Drafts

View All Users | All Facilities ▼

Export Filter: OFF

Name	Type	Created Date	
Field Trip Zoo	District	07/03/2023	<div> </div> <div> Duplicate View </div>

a. Upon clicking Duplicate, you will be prompted to enter a new draft title. Click **OK** when done or click **Cancel** to return the Drafts tab.

Please enter a name of the new field trip

Cancel **OK**

The copy created opens in the Current Field Trip tab. For more information on completing a Field Trip Request, see [Creating a Field Trip Draft](#). Click the **Drafts** tab to return to the drafts.

8. To delete a draft, click the **delete** button (red minus sign).

Writer
scurr
ent

Select Employee ▼ Field Trip Request

Drafts **Templates** Field Trip History Current Field Trip

Create

View All Users All Facilities ▼

3. From the Templates tab, you can create a new template as well as continue editing Existing Templates. Before continuing, be sure the correct fiscal year is selected from the pull-down; it defaults to the current year.

Drafts Templates Field Trip History Current Field Trip 2022 - 2023 ▼

Create a Field Trip Request

Create

Existing Templates

View All Users All Facilities ▼

Export Filter: OFF

Name	Type	
Template 1	Internal	Duplicate View Use

4. Name the template and click **Create**.

Drafts Templates Field Trip History Current Field Trip

Create a Field Trip Request

Elementary Park Trip Create

Existing Templates

View All Users All Facilities ▼

No Records Found

5. Enter as much information as desired in order for other users to create field trip requests. The rest of the information in the top section can only be completed upon creating a draft.

2022 - 2023

Elementary Park Trip

Number 5227 Field Trip Status Template Field Trip Type Creator Vigil, Lizette Created Date 07/03/2023 Submitted Date Requesting Facility Sponsoring Organization

Date Start Recurring

of Students # of Adults # of Wheelchairs # of Bus Aides # of Buses

Requested By @in...s.org Pick Up Contact Final Destination Estimated Trip Miles 0 Are To Go Lunches Required?

Pick-Ups/Drop-Offs

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
													Departure
Total Time: 0:00		Est Cost: \$0.00											

Allocations

Facility	Department	Fund	Function	Object	Project	Program	Budgeted	Committed	Encumbered	Expended	Balance	Amount
----------	------------	------	----------	--------	---------	---------	----------	-----------	------------	----------	---------	--------

6. Click **Generate** to add information to the template via the Generate Locations pop-up, which populates the Pick-Ups/Drop-Offs section. For more information on completing this section, follow the steps described in [Pick-Ups/Drop-Offs](#).

7. **Allocations** cannot be added to a template. However, **Files** and **Comments** can be added as needed. See [Finalizing the Field Trip Request](#) for more information on adding Files and Comments.

8. All information added saves automatically. Click the **Templates** tab to view the create template in the **Existing Templates** section.

Writer
scurr
nt

Select Employee ▼ Field Trip Request

Drafts Templates Field Trip History Current Field Trip

Create a Field Trip Request

Create

Existing Templates

View All Users All Facilities ▼

Export

Filter: OFF

Name	Type	
Elementary Park Trip	District	<div>Duplicate</div> <div>View</div> <div>Use</div>

9. To view templates created by other users, click **View All Users**.

Existing Templates

View All Users All Facilities ▼

Export

Filter: OFF

Name	Type	
Elementary Park Trip	District	<div>Duplicate</div> <div>View</div> <div>Use</div>
Template 1	District	<div>Duplicate</div> <div>View</div> <div>Use</div>

a. To **Hide All Users** and display templates only you created, click the corresponding button.

Existing Templates

Hide All Users All Facilities ▼

Export

Filter: OFF

Name	Type	User	
MOONSHOT ACADEMY FALL 2022 - DTE	District	Serra	<div>Duplicate</div> <div>View</div> <div>Use</div>
Elementary Park Trip	District	Vigil, Lizette	<div>Duplicate</div> <div>View</div> <div>Use</div>
Template 1	District	Vigil, Lizette	<div>Duplicate</div> <div>View</div> <div>Use</div>

10. To view templates applicable to a specific facility, select the facility from the provided pull-down. The pull-down defaults to All Facilities.

The screenshot shows the 'Existing Templates' interface. At the top, there is a header 'Existing Templates'. Below it, there is a 'Hide All Users' button and a dropdown menu currently set to 'All Facilities', which is highlighted with a red box. Below the dropdown are 'Export' and 'Filter: OFF' buttons. The main area contains a table with columns: Name, Type, User, and three action buttons (Duplicate, View, Use). The table lists three templates: 'MOONSHOT ACADEMY FALL 2022 - DTE', 'Elementary Park Trip', and 'Template 1'. Each row has a red minus icon on the left and the corresponding action buttons on the right.

Name	Type	User	
MOONSHOT ACADEMY FALL 2022 - DTE	District	Serra	Duplicate View Use
Elementary Park Trip	District	Vigil, Lizette	Duplicate View Use
Template 1	District	Vigil, Lizette	Duplicate View Use

11. Once the template has been created, you can click the text underlined in blue to edit the **Name**.

The screenshot shows the 'Existing Templates' interface with the 'Elementary Park Trip' template selected. The 'View All Users' button is now visible instead of 'Hide All Users'. The 'All Facilities' dropdown is still present. The 'Elementary Park Trip' row is highlighted, and its name field is underlined in blue, indicating it is editable. The 'Duplicate', 'View', and 'Use' buttons are visible for this template.

Name	Type	
Elementary Park Trip	District	Duplicate View Use

12. To create a copy of the template and edit it as needed for other uses, click the **Duplicate** button.

13. Click the **View** button to view and edit the template.

The screenshot shows the 'Existing Templates' interface with the 'Elementary Park Trip' template selected. A red box highlights the 'Duplicate' and 'View' buttons, indicating they are the focus of the next steps.

Name	Type	
Elementary Park Trip	District	Duplicate View Use

14. Click the **Use** button to use the template and create a field trip request draft. Once Use is clicked, you will be prompted to enter a name of the new field trip request draft.

a. Name the draft and click **OK**. Click **Cancel** to close the pop-up window and return to the Templates tab.

X

Please enter a name of the new field trip

Cancel OK

Once the draft is named, the Current Field Trip tab is opened. From this point forward, you are creating a new draft. For more information, follow the steps outlined in [Creating a Field Trip Draft](#).

Writer
scurr
nt

Select Employee ▾

Field Trip Request

Lizette Vigil

SIS
ERP

Drafts

Templates

Field Trip History

Current Field Trip

2022 - 2023 ▾

Using Template

Number

Field Trip Status

Field Trip Type

Creator

Created Date

Submitted Date

Requesting Facility

Sponsoring Organization

5228

Unsubmitted

Field Trip Type

Vigil, Lizette

07/03/2023

Date

Recurring

Start

☐

of Students

of Adults

of Wheelchairs

of Bus Aides

of Buses

Requested By

Pick Up Contact

Final Destination

Estimated Trip Miles

Are To Go Lunches Required?

@inc...org

0

☐

Pick-Ups/Drop-Offs

Generate

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
													Departure ▾
Total Time: 0:00		Est Cost: \$0.00											

15. To remove any existing templates, click the **delete** button.

Existing Templates

View All Users

All Facilities ▾

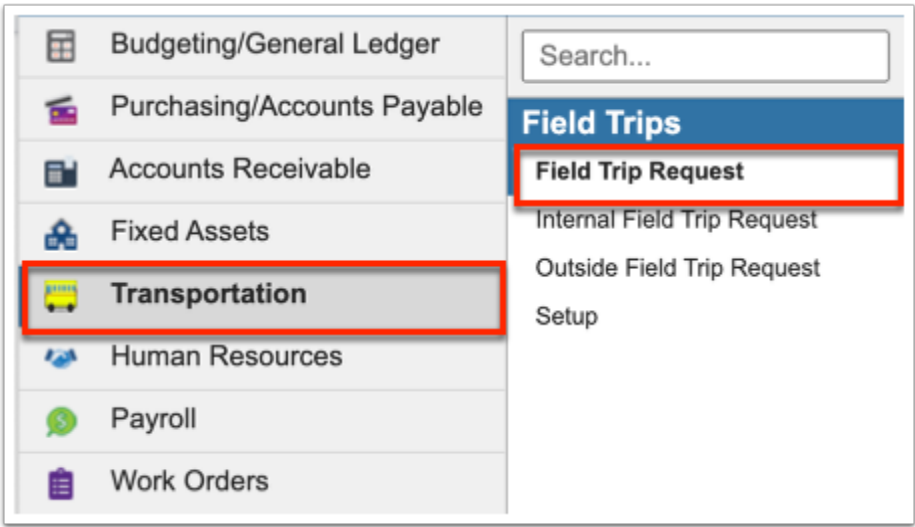
Export

Filter: OFF

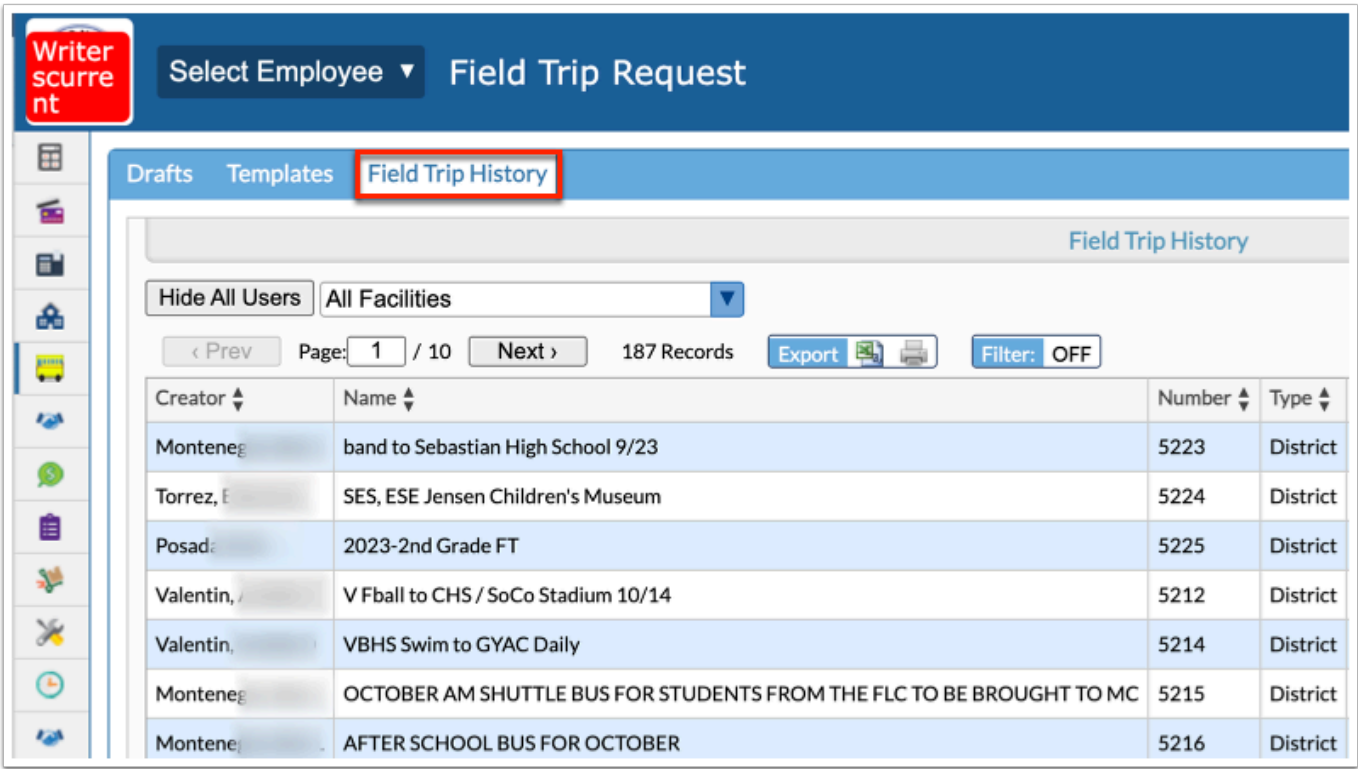
Name ▴▾	Type ▴▾	
<div>Elementary Park Trip</div>	District	<div>Duplicate</div> <div>View</div> <div>Use</div>
<div>Template 1</div>	District	<div>Duplicate</div> <div>View</div> <div>Use</div>

Field Trip History

1. In the **Transportation** menu, click **Field Trip Request**.



2. Once a field trip request has been submitted, click the **Field Trip History** tab to view the status of your request.



3. To view field trip history for a specific fiscal year, select the fiscal year from the pull-down. The pull-down defaults to the current fiscal year.

Writer scurrent Select Employee Field Trip Request Lizette Vigil SIS ERP

Drafts Templates Field Trip History 2022 - 2023

Field Trip History

Hide All Users All Facilities

< Prev Page: 1 / 10 Next > 187 Records Export Filter: OFF

Creator	Name	Number	Type	Status	Created Date	Start Date	End Date	To
---------	------	--------	------	--------	--------------	------------	----------	----

4. To **View All Users** who have submitted a request, click the corresponding button. Note: Only select users have permission to view all users' requests. The requests that display when View All Users is selected depends on permissions set up via Setup > [Accounting Strips](#).

Writer scurrent Select Employee Field Trip Request

Drafts Templates Field Trip History

Field Trip History

View All Users All Facilities

a. Upon viewing all users' requests, you can **Hide All Users** to display only your own requests again.

Writer scurrent Select Employee Field Trip Request

Drafts Templates Field Trip History

Field Trip History

Hide All Users All Facilities

< Prev Page: 1 / 10 Next > 187 Records Export Filter: OFF

Creator	Name
Montene	band to Sebastian High School 9/23
Torrez, E	SES, ESE Jensen Children's Museum
Posad	2023-2nd Grade FT
Valentin, /	V Fball to CHS / SoCo Stadium 10/14
Valentin,	VBHS Swim to GYAC Daily
Montene	OCTOBER AM SHUTTLE BUS FOR STUDENTS FROM THE FLC TO BE BROUGHT TO MC
Montene	AFTER SCHOOL BUS FOR OCTOBER

5. Select the Facilities for which you want to view field trip history from the pull-down. The default is All Facilities.

The screenshot shows the 'Field Trip Request' interface. At the top, there's a blue header with 'Writer's current' and 'Select Employee'. Below this, a navigation bar has 'Drafts', 'Templates', and 'Field Trip History' tabs. The 'Field Trip History' tab is active. Below the tabs, there's a search bar with 'Hide All Users' and a dropdown menu set to 'All Facilities'. To the right of the search bar, there are buttons for '< Prev', 'Page: 1 / 10', 'Next >', '187 Records', 'Export', and 'Filter: OFF'. Below this, a table displays field trip requests with columns for Creator, Name, and Number.

Creator	Name	Number
Montene	band to Sebastian High School 9/23	522
Torrez, E	SES, ESE Jensen Children's Museum	522
Posad	2023-2nd Grade FT	522
Valentin, /	V Fball to CHS / SoCo Stadium 10/14	522
Valentin,	VBHS Swim to GYAC Daily	522
Montene	OCTOBER AM SHUTTLE BUS FOR STUDENTS FROM THE FLC TO BE BROUGHT TO MC	522
Montene	AFTER SCHOOL BUS FOR OCTOBER	522

From this tab, you can review the Creator of the request, the Name, the field trip Number assigned, the Type of trip, the Status of the request, the Created Date, the Start Date and End Date of the field trip, Total Hours, Cost, Requesting Facility, the # of Students, # of Adults, # of Wheelchairs, the # of Bus Aides, the # of Buses, and whether or not the field trip has been Completed.

The screenshot shows a detailed view of the 'Field Trip History' table. The table has columns for Creator, Name, Number, Type, Status, Created Date, Start Date, End Date, Total Hours, Cost, and Requesting Facility. The table is filtered to show 'All Facilities' and '187 Records'.

Creator	Name	Number	Type	Status	Created Date	Start Date	End Date	Total Hours	Cost	Requesting Facility
Serran	MOONSHOT ACADEMY FALL 2022 - DTE	5122	District	Approved	08/29/2022	09/20/2022	09/29/2022	3:00	135.00	LEMEN
Marti	October Title 1	5168	District	Pending	09/12/2022	10/03/2022	10/04/2022	1577843:00	450.00	FOCUS COAST ELEMENT
Marti	Title 1 - September 2022	5088	District	Approved	08/18/2022	09/06/2022	09/29/2022	11:00	495.00	FOCUS COAST ELEMENT
Medi	TCE STEP into K AM	4956	District	Approved	07/01/2022	07/01/2022	07/01/2022	1:00	285.00	FOCUS COAST ELEMENT
Medi	TCE STEP into K PM	4959	District	Approved	07/01/2022	07/01/2022	07/01/2022	1:00	222.50	FOCUS COAST ELEMENT
Monter	band to Sebastian High School 9/23	5223	District	Approved	09/23/2022	09/23/2022	09/23/2022	5:30	1,237.50	FOCUS HIGH SCHOOL
Valenti	V Fball to CHS / SoCo Stadium 10/14	5212	District	Pending	09/22/2022	10/14/2022	10/14/2022	7:00	630.00	FOCUS HIGH SCHOOL
Valenti	VBHS Swim to GYAC Daily	5214	District	Pending	09/22/2022	10/04/2022	10/20/2022	2:45	123.75	FOCUS HIGH SCHOOL
Monter	OCTOBER AM SHUTTLE BUS FOR STUDENTS FROM THE FLC TO BE BROUGHT TO MC	5215	District	Pending	09/22/2022	10/03/2022	10/31/2022	3:30	157.50	FOCUS HIGH SCHOOL
Valenti	VBHS Fball to SRHS 9/23	5219	District	Approved	09/22/2022	09/23/2022	09/23/2022	6:15	562.50	FOCUS HIGH SCHOOL
Valenti	VBHS Cheer to SRHS 9/23	5221	District	Denied	09/22/2022	09/23/2022	09/23/2022	6:15	281.25	FOCUS HIGH SCHOOL

6. Hover over the **Status** of the request to view the Approval Chain; i.e. the user(s) responsible for reviewing and approving your request. The Approval Chain shows which users are pending (hourglass) and which users have approved the request (green check mark). If the request is

denied by any one user in the approval chain, the request will be sent back to the creator of the request as denied.

Number	Type	Status	Created Date	Start Date	End Date	Total Hours	Cost
5122	District	Approved	08/29/2022	09/20/2022	09/29/2022	3:00	135.00
5168	District	Pending	09/12/2022	10/03/2022	10/04/2022	1577843:00	450.00
5088	District	Approved	08/18/2022	09/06/2022	09/29/2022	11:00	495.00
4956	District	Approved	07/01/2022	07/01/2022	07/01/2022	1:00	285.00
4959	District	Approved	07/01/2022	07/01/2022	07/01/2022	1:00	222.50
5223	District	Approved	09/22/2022	09/23/2022	09/23/2022	5:30	1,237.50
5212	District	Pending	09/22/2022	10/14/2022	7:00	630.00	<div> <div>Approval Chain</div> <div>— Transportation —</div> <div>Lewis,</div> </div>
5214	District	Pending	09/22/2022	10/20/2022	2:45	123.75	
5215	District	Pending	09/22/2022	10/03/2022	10/31/2022	3:30	157.50
5219	District	Approved	09/22/2022	09/23/2022	09/23/2022	6:15	562.50
5221	District	Denied	09/22/2022	09/23/2022	09/23/2022	6:15	281.25
5208	District	Pending	09/21/2022	09/28/2022	09/28/2022	0:20	45.00

7. Click the **View** button in the last row of the table to open the request in the Current Field Trip tab.

Drafts
Templates
Field Trip History
Current Field Trip
2022 - 2023

Field Trip History

Hide All Users All Facilities

Prev

Page: 1 / 10

Next

187 Records

Export

Filter: OFF

Created Date	Start Date	End Date	Total Hours	Cost	Requesting Facility	# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	
23/2022	09/23/2022	09/23/2022	5:30	1,237.50	FOCUS HIGH SCHOOL	175	15	0	0	5	No	View Duplicate Cancel
23/2022	10/27/2022	10/27/2022	4:15	191.25	SEBASTIAN ELEMENTARY	11	6	0	0	1	No	View Duplicate Cancel
23/2022												View Duplicate Cancel
22/2022												View Duplicate Cancel
22/2022												View Duplicate Cancel
22/2022												View Duplicate Cancel
22/2022												View Duplicate Cancel
22/2022												View Duplicate Cancel
22/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
21/2022												View Duplicate Cancel
20/2022												View Duplicate Cancel

Writer's current

Select Employee

Field Trip Request

Lizette Vigil

SIS ERP

View

Drafts Templates Field Trip History Current Field Trip 2022 - 2023

V Fball to CHS / SoCo Stadium 10/14

Number 5212

Field Trip Status Pending

Field Trip Type N/S

Creator Valentin

Created Date 09/22/2022

Submitted Date 09/22/2022 7:47am

Requesting Facility 0031 FOCUS HI...

Sponsoring Organization Athletics

Date 10/14/2022

Recurring

of Students 70

of Adults 15

of Wheelchairs 0

of Bus Aides 0

of Buses 2

Requested By leonard.jankowski@indianriverschools.org

Pick Up Contact Lenny

Final Destination TSCS SOUTH C...

Estimated Trip Miles 0

Are To Go Lunches Required?

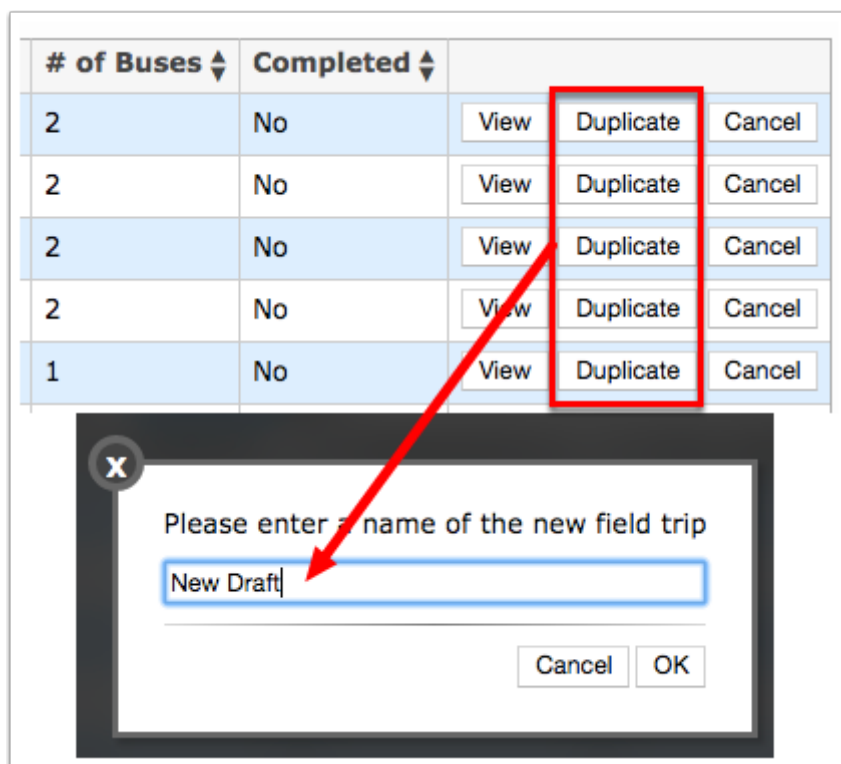
Pick-Ups/Drop-Offs

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
V Fball to CHS	10/14/2022	04:00 pm	0031 ...	Gym	10/14/2022	04:30 pm	TSCS S...	Stadium	70	15	0	0	Departure
V Fball return	10/14/2022	10:30 pm	TSCS ...	Stadium	10/14/2022	11:00 pm	0031 F...	Gym	70	15	0	0	Return

Total Time: 7:00 Est Cost: \$630.00

Once a field trip request has been approved, the Complete Field Trip tab displays. From this tab, you can enter additional information in order to complete the trip. This step would take place after the field trip has taken place. For more information see [Complete Field Trip](#).

8. Click the **Duplicate** button to create a copy of the request. Clicking Duplicate will create a new draft.



a. Upon creating a copy, you will be prompted to enter a name of the new field trip. Click **OK** once the name has been entered. You can also click **Cancel** to close the pop-up window and return to the Filed Trip History tab.

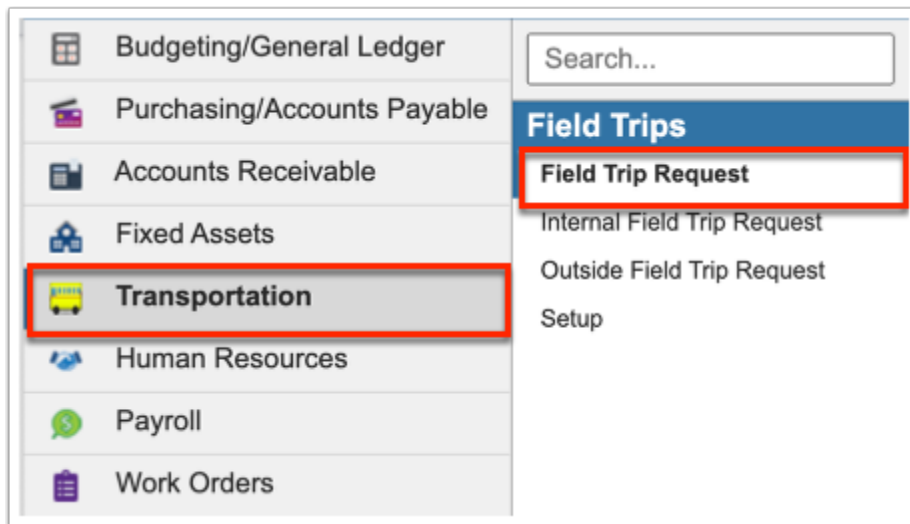
9. Click **Cancel** to cancel the field trip.

Pending Approval

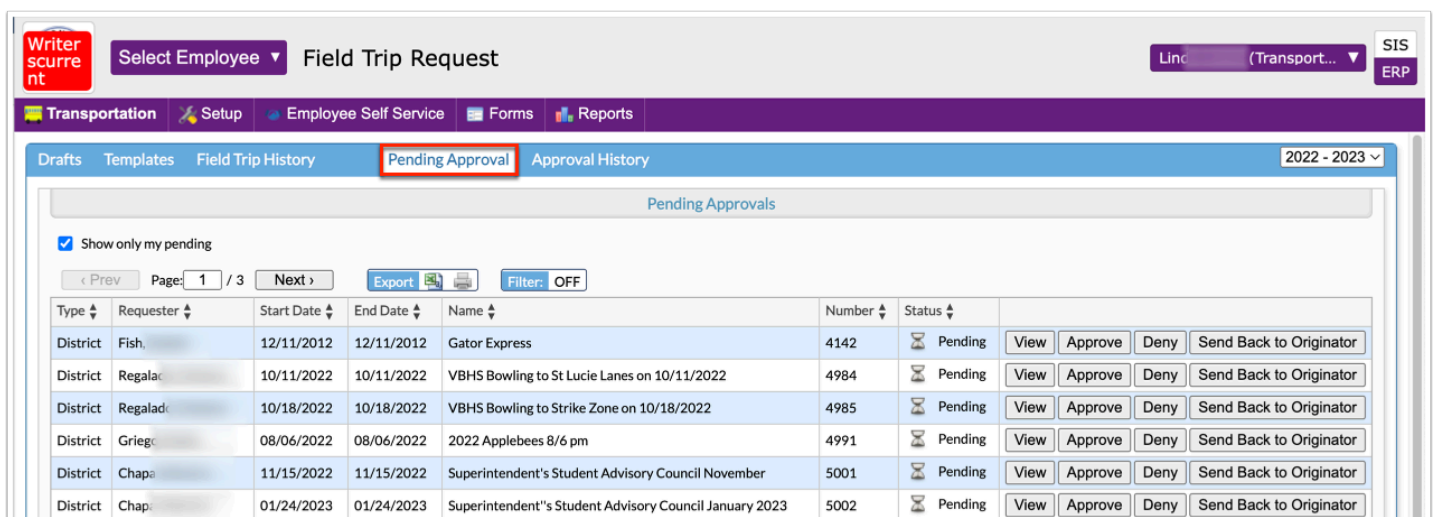
i The "Requesting Facility" and "Sponsoring Organization" properties can be added as signposts to the Field Trip Request flow type via Setup > [Approval Flow](#) > Field Trip Request.

- Sponsoring organizations are set up via Transportation > [Setup](#) > [Sponsoring Organizations](#) tab. Facilities are set up via Setup > [Settings](#) > [Facilities](#) tab.

1. In the **Transportation** menu, click **Field Trip Request**.



2. If you are a part of the Approval Chain for field trip requests, you will see a tab called **Pending Approval**. Click the tab to review all requests in order to be approved, denied, or sent back to originator.



3. To view pending approvals for a specific fiscal year, select the year from the pull-down. The pull-down defaults to the current fiscal year.

Writer's current Select Employee Field Trip Request Link (Transport... SIS ERP)

Transportation Setup Employee Self Service Forms Reports

Drafts Templates Field Trip History Pending Approval Approval History 2022 - 2023

Pending Approvals

☒ Show only my pending

Prev Page: 1 / 3 Next Export Filter: OFF

Type	Requester	Start Date	End Date	Name	Number	Status	
District	Fish	12/11/2012	12/11/2012	Gator Express	4142	Pending	View Approve Deny Send Back to Originator
District	Regalad	10/11/2022	10/11/2022	VBHS Bowling to St Lucie Lanes on 10/11/2022	4984	Pending	View Approve Deny Send Back to Originator
District	Regalad	10/18/2022	10/18/2022	VBHS Bowling to Strike Zone on 10/18/2022	4985	Pending	View Approve Deny Send Back to Originator
District	Grieg	08/06/2022	08/06/2022	2022 Applebees 8/6 pm	4991	Pending	View Approve Deny Send Back to Originator
District	Chap	11/15/2022	11/15/2022	Superintendent's Student Advisory Council November	5001	Pending	View Approve Deny Send Back to Originator
District	Chap	01/24/2023	01/24/2023	Superintendent's Student Advisory Council January 2023	5002	Pending	View Approve Deny Send Back to Originator

4. The **Show only my pending** check box is selected by default. To view requests pending approval by other users part of the approval chain, clear the selected check box.

The Pending Approvals table displays the Type of request, the Requester, the Start Date and End Date of the field trip, the Name of the request, the assigned Number, and the Status of the request, such as Pending, Approved, Denied.

Pending Approvals

☒ Show only my pending

Prev Page: 1 / 3 Next Export Filter: OFF

Type	Requester	Start Date	End Date	Name	Number	Status	
District	Fish	12/11/2012	12/11/2012	Gator Express	4142	Pending	View Approve Deny Send Back to Originator
District	Regalad	10/11/2022	10/11/2022	VBHS Bowling to St Lucie Lanes on 10/11/2022	4984	Pending	View Approve Deny Send Back to Originator
District	Regalad	10/18/2022	10/18/2022	VBHS Bowling to Strike Zone on 10/18/2022	4985	Pending	View Approve Deny Send Back to Originator
District	Grieg	08/06/2022	08/06/2022	2022 Applebees 8/6 pm	4991	Pending	View Approve Deny Send Back to Originator
District	Chap	11/15/2022	11/15/2022	Superintendent's Student Advisory Council November	5001	Pending	View Approve Deny Send Back to Originator
District	Chap	01/24/2023	01/24/2023	Superintendent's Student Advisory Council January 2023	5002	Pending	View Approve Deny Send Back to Originator

5. Hover over the **Status** of the request to view the Approval Chain; i.e. the user(s) responsible for reviewing and approving your request. The Approval Chain shows which users are pending (hourglass) and which users have approved the request (green check mark). If the request is denied by any one user in the approval chain, the request will be sent back to the creator of the request as denied.

Pending Approval

Approval History

2022 - 2023

Pending Approvals

Export

Filter: OFF

End Date	Name	Number	Status	Approval Chain			
12/11/2012	Gator Express	4142	Pending	<div> <div>Transportation</div> <div> <div>Send Back to Originator</div> </div> </div>			
10/11/2022	VBHS Bowling to St Lucie Lanes on 10/11/2022	4984	Pending	View	Approve	Deny	Send Back to Originator
10/18/2022	VBHS Bowling to Strike Zone on 10/18/2022	4985	Pending	View	Approve	Deny	Send Back to Originator
08/06/2022	2022 Applebees 8/6 pm	4991	Pending	View	Approve	Deny	Send Back to Originator
11/15/2022	Superintendent's Student Advisory Council November	5001	Pending	View	Approve	Deny	Send Back to Originator
01/24/2023	Superintendent's Student Advisory Council January 2023	5002	Pending	View	Approve	Deny	Send Back to Originator
03/28/2023	Superintendent's Student Advisory Council March 2023	5003	Pending	View	Approve	Deny	Send Back to Originator
10/21/2022	SRHS to Jensen Beach 10/21 FB	5013	Pending	View	Approve	Deny	Send Back to Originator

6. Click the **View** button in the last row of the table to open the request in the Current Field Trip tab.

Drafts
Templates
Field Trip History
Pending Approval
Approval History
2022 - 2023

Pending Approvals

☒ Show only my pending

Prev
Page: 1 / 3
Next

Export
Filter: OFF

Type	Requester	Start Date	End Date	Name	Number	Status				
District	Fish...	12/11/2012	12/11/2012	Gator Express	4142	Pending	View	Approve	Deny	Send Back to Originator
District	R...	10/11/2022	10/11/2022	VBHS Bowling to St Lucie Lanes on 10/11/2022	4984	Pending	View	Approve	Deny	Send Back to Originator
District	R...	10/18/2022	10/18/2022	VBHS Bowling to Strike Zone on 10/18/2022	4985	Pending	View	Approve	Deny	Send Back to Originator
District	G...	08/06/2022	08/06/2022	2022 Applebees 8/6 pm	4991	Pending	View	Approve	Deny	Send Back to Originator
District	C...	11/15/2022	11/15/2022	Superintendent's Student Advisory Council November	5001	Pending	View	Approve	Deny	Send Back to Originator
District	C...	01/24/2023	01/24/2023	Superintendent's Student Advisory Council January 2023	5002	Pending	View	Approve	Deny	Send Back to Originator
District	C...	03/28/2023	03/28/2023	Superintendent's Student Advisory Council March 2023	5003	Pending	View	Approve	Deny	Send Back to Originator
District	T...	10/21/2022	10/21/2022	SRHS to Jensen Beach 10/21 FB	5013	Pending	View	Approve	Deny	Send Back to Originator

Drafts
Templates
Field Trip History
Pending Approval
Approval History
Current Field Trip
2022 - 2023

Gator Express

Number: 4142
Field Trip Status: Pending
Field Trip Type: N/S
Creator: Fish...
Created Date: 01/11/2022
Submitted Date: 01/11/2022 10:24am
Requesting Facility: 0201 GLENDAL...
Sponsoring Organization: Academics

Date: 12/11/2012
Recurring: ☐

of Students: 10
of Adults: 6
of Wheelchairs: 0
of Bus Aides: 0
of Buses: 1

Requested By: ussell@in...ools.org
Pick Up Contact: Ken
Final Destination: 0201 GLENDAL...
Estimated Trip Miles: 0
Are To Go Lunches Required?: ☐

Pick-Ups/Drop-Offs

Description	Pick-Up Date	Pick-Up Time	Pick-Up Facility	Pick-Up Location	Drop-Off Date	Drop-Off Time	Drop-Off Facility	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type
Bus Loop	12/11/2012	08:45 am	0201 ...	Glendale	12/11/2012	11:00 am	0000 S...	Various Stops	10	6	0	0	Departure

Total Time: 2:15
Est Cost: \$101.25

From the Current Field Trip tab you can review all of the information in order to make an informed decision about the request. To **Approve**, **Deny**, or **Send Back to Originator** for edits, you can scroll to the bottom of the screen while on the Current Field Trip tab or click the Pending Approval tab.

Allocations									
Function ▾	Object ▾	Project ▾	Program ▾	Budgeted	Committed	Encumbered	Expended	Balance	Amount
7823 : ... ▾	3310 ... ▾	1999 ... ▾		26,508.60	2,027.50	1,902.70	8,242.50	14,335.90	195.00
Total									195.00

Comments

Driver Pool

All Pools ▾

From this tab, you must select a specific **Driver Pool** from the pull-down to apply to the field trip request. The pool selected determines the drivers who will be assigned to the trip once approved. Driver Pools are set up via Transportation > [Setup](#) > [Bus Driver Pools](#).

- On the Pending Approval tab, click the **Approve** button to approve the field trip request.
- Click the **Deny** button, to deny the request.
- Click **Send Back to Originator** to send the request back to the requester with a message as to what needs to be edited and resubmitted. Once the message has been entered, click the **Send** button. To cancel, click the **X**.

X

Send Back to Originator

Please fix the allocation. You have indicated the wrong account. |

- From this screen, you can also **Print Unofficial** documentation by clicking the corresponding button.

Allocations

Object	Program	Budgeted	Committed	Encumbered	Expended	Balance	Amount
							101.25
77 : GENERAL - SCHOOL IMP (LOTTERY)(FTE)		1,074.50	926.00	-120.00	0.00	268.50	101.25
						Total	101.25

Post

Approve

Deny

Send Back to Originator

Print Unofficial

Driver Pool

All Pools

- To print, click the **printer** icon located in the upper right corner of the screen.
- Click the **down arrow** to download the image as a PDF file.

Modules.php

1 / 1

90%

Gator Express

2023-07-03

Field Trip Request

Number

4142

Creator

Fish

Created Date

2022-01-11

Date Range

2012-12-11 – 2012-12-11

Recurring

No

Field Trip Status

P

of Students

10

of Adults

6

of Wheelchairs

0

of Buses

1


Locations

Pick Up				Drop Off			
Date	Time	Facility	Location	Date	Time	Facility	Location
2012-12-11	08:45 am	0201 ELEMENTARY	Glendale	2012-12-11	11:00 am	0000 SCHOOL DISTRICT OF OWL COUNTY	Various Stops

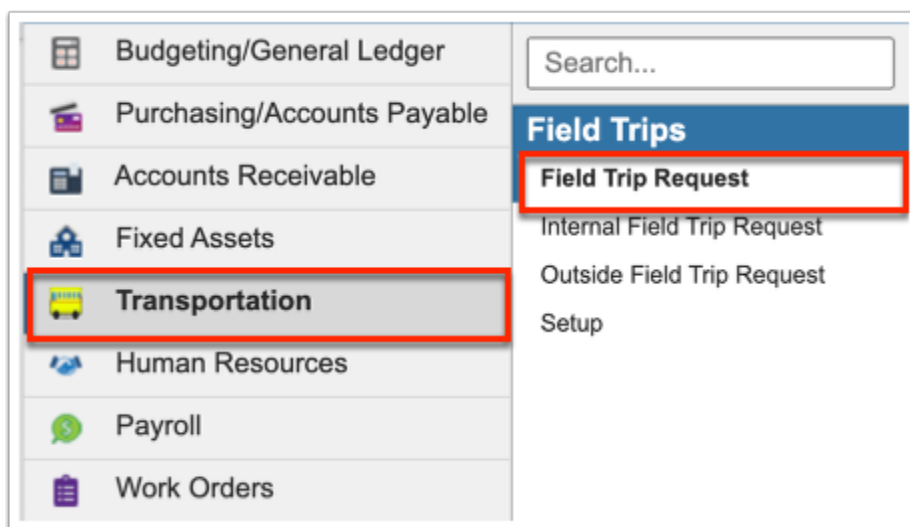
Allocations

Facility	Department	Fund	Function	Object	Project	Program	Amount
0201	00	100	5102	5100	1077		101.25

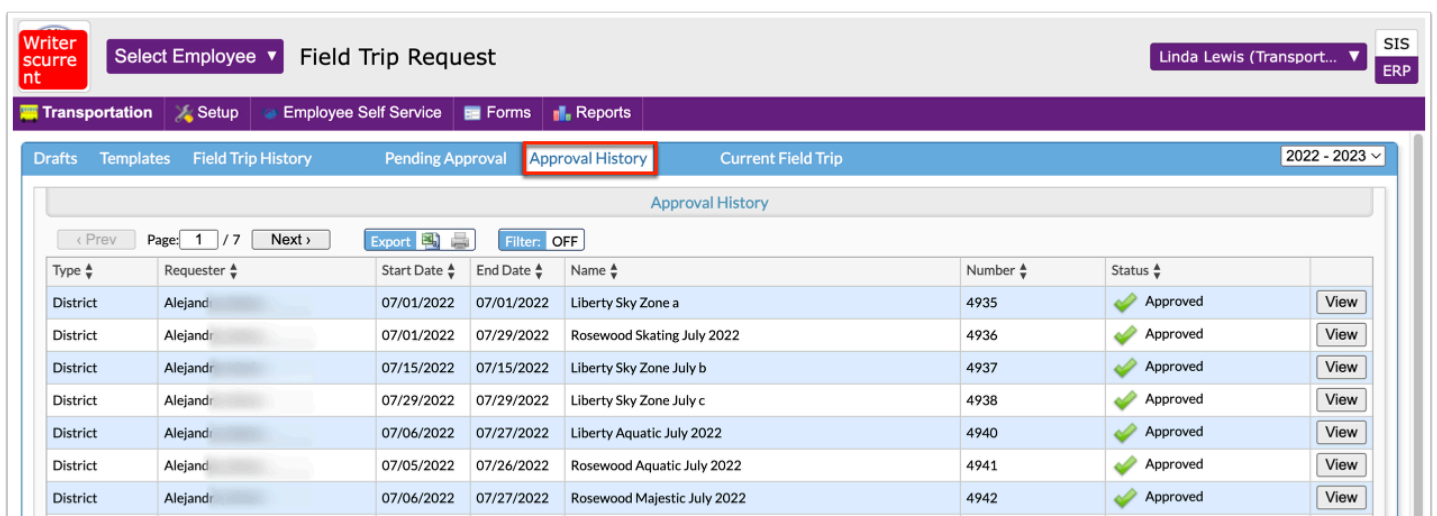
Approval History

-  The “Requesting Facility” and “Sponsoring Organization” properties can be added as signposts to the Field Trip Request flow type via Setup > [Approval Flow](#) > Field Trip Request.
- Sponsoring organizations are set up via Transportation > [Setup](#) > [Sponsoring Organizations](#) tab. Facilities are set up via Setup > [Settings](#) > [Facilities](#) tab.

1. In the **Transportation** menu, click **Field Trip Request**.



2. If you are a part of the Approval Chain for field trip requests, you will see a tab called **Approval History**. Click the tab to review all approved or denied requests.

A screenshot of a software interface showing the 'Approval History' tab. The interface includes a top navigation bar with 'Transportation', 'Setup', 'Employee Self Service', 'Forms', and 'Reports'. Below this is a sub-navigation bar with 'Drafts', 'Templates', 'Field Trip History', 'Pending Approval', 'Approval History' (highlighted), and 'Current Field Trip'. The 'Approval History' tab displays a table of requests. The table has columns for Type, Requester, Start Date, End Date, Name, Number, Status, and a View button. The table shows seven rows of data, all with a status of 'Approved'.

Type	Requester	Start Date	End Date	Name	Number	Status	
District	Alejandr	07/01/2022	07/01/2022	Liberty Sky Zone a	4935	Approved	View
District	Alejandr	07/01/2022	07/29/2022	Rosewood Skating July 2022	4936	Approved	View
District	Alejandr	07/15/2022	07/15/2022	Liberty Sky Zone July b	4937	Approved	View
District	Alejandr	07/29/2022	07/29/2022	Liberty Sky Zone July c	4938	Approved	View
District	Alejandr	07/06/2022	07/27/2022	Liberty Aquatic July 2022	4940	Approved	View
District	Alejandr	07/05/2022	07/26/2022	Rosewood Aquatic July 2022	4941	Approved	View
District	Alejandr	07/06/2022	07/27/2022	Rosewood Majestic July 2022	4942	Approved	View

The Approval History table displays the Type of request, the Requester, the Start Date and End Date of the field trip, the Name of the request, the assigned Number, and the Status of the request, such as Approved or Denied.

Approval History							
◀ Prev	Page: 1 / 7	Next ▶	Export	Filter: OFF			
Type	Requester	Start Date	End Date	Name	Number	Status	
District	Alejandr	07/01/2022	07/01/2022	Liberty Sky Zone a	4935	✓ Approved	View
District	Alejandr	07/01/2022	07/29/2022	Rosewood Skating July 2022	4936	✓ Approved	View
District	Alejandr	07/15/2022	07/15/2022	Liberty Sky Zone July b	4937	✓ Approved	View
District	Alejandr	07/29/2022	07/29/2022	Liberty Sky Zone July c	4938	✓ Approved	View
District	Alejandr	07/06/2022	07/27/2022	Liberty Aquatic July 2022	4940	✓ Approved	View
District	Alejandr	07/05/2022	07/26/2022	Rosewood Aquatic July 2022	4941	✓ Approved	View
District	Alejandr	07/06/2022	07/27/2022	Rosewood Majestic July 2022	4942	✓ Approved	View

3. Hover over the **Status** of the request to view the Approval Chain; i.e. the user(s) responsible for reviewing and approving your request. The Approval Chain shows which users are pending (hourglass) and which users have approved the request (green check mark). If the request is denied by any one user in the approval chain, the request will be sent back to the creator of the request as denied.

Approval History

Current Field Trip

2022 - 2023

Approval History

Filter: OFF

Date	Name	Number	Status	
7/1/2022	Liberty Sky Zone a	4935	Approved	View
7/29/2022	Rosewood Skating July 2022		Approved	View
7/15/2022	Liberty Sky Zone July b		Approved	View
7/29/2022	Liberty Sky Zone July c		Approved	View
7/6/2022	Liberty Aquatic July 2022	4940	Approved	View
7/5/2022	Rosewood Aquatic July 2022	4941	Approved	View
7/6/2022	Rosewood Majestic July 2022	4942	Approved	View

Approval Chain

Transportation

Linda - 07/01/2022 1:12pm

Approval Chain

Transportation

✓

Linda - 07/01/2022 1:12pm

4. Click the **View** button in the last row of the table to open the request in the Current Field Trip tab.

Writer's current

Select Employee ▾ Field Trip Request

Linda Lewis (Transport... ▾ SIS ERP

Transportation Setup Employee Self Service Forms Reports

Drafts Templates Field Trip History Pending Approval Approval History Current Field Trip 2022 - 2023 ▾

Approval History

Page: 1 / 7 Export Filter: OFF

Type ▾	Requester ▾	Start Date ▾	End Date ▾	Name ▾	Number ▾	Status ▾	
District	Alejan...	07/01/2022	07/01/2022	Liberty Sky Zone a	4935	Approved	View
District	Alejan...						View
District	Alejan...						View
District	Alejan...						View
District	Alejan...						View
District	Alejan...						View
District	Alejan...						View

Completed

Liberty Sky Zone a

Field Trip Drivers
Jane McGinnis ✓ Accepted
Sara Anthony ✓ Accepted

Number 4935 Field Trip Status Approved Field Trip Type N/S Creator Alejan... Created Date 07/01/2022 Submitted Date 07/01/2022 7:28am

Requesting Facility 8301 LIBERTY M... Sponsoring Organization Extended Day Date 07/01/2022 Recurring ☐

of Students 60 # of Adults 6 # of Wheelchairs 0 # of Bus Aides 0 # of Buses 2

Requested By miche...@ind...org Pick Up Contact Final Destination TSKZ SKYZONE Estimated Trip Miles 0

Are To Go Lunches Required? ☐

Field Trip Drivers

1. In the **Transportation** menu, click **Field Trip Request**.

Budgeting/General Ledger Search...

Purchasing/Accounts Payable

Accounts Receivable

Fixed Assets

Transportation

Human Resources

Payroll

Work Orders

Field Trips

Field Trip Request

Internal Field Trip Request

Outside Field Trip Request

Setup

2. Click the **Field Trip History** tab.

3. Once the field trip request has been approved by all users in the Approval Chain and a Driver Pool has been selected by one of the approvers, as described in [Pending Approval](#), click the **View** button next to the approved request.

Created Date	Start Date	End Date	Total Hours	Cost	Requesting Facility	# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	
09/23/2022	09/23/2022	09/23/2022	5:30	1,237.50	FOCUS HIGH SCHOOL	175	15	0	0	5	No	View Duplicate Cancel
09/22/2022	09/23/2022	09/23/2022	6:15	562.50	FOCUS HIGH SCHOOL	70	15	0	0	2	No	View Duplicate Cancel
09/19/2022	09/22/2022	09/22/2022	5:00	225.00	FOCUS HIGH SCHOOL	30	1	0	0	1	No	View Duplicate Cancel
09/19/2022	09/20/2022	09/20/2022	3:00	135.00	SUPERINTENDENT'S OFFICE	35	0	0	0	1	No	View Duplicate Cancel
09/19/2022	09/20/2022	09/20/2022	3:00	135.00	SUPERINTENDENT'S OFFICE	35	0	0	0	1	No	View Duplicate Cancel
09/15/2022	10/07/2022	10/07/2022	3:45	168.75	SEINFELD RIVER MIDDLE SCHL	26	3	0	0	1	No	View Duplicate Cancel
09/13/2022	09/29/2022	09/29/2022	5:00	225.00	FOCUS HIGH SCHOOL	21	1	0	0	1	No	View Duplicate Cancel
09/12/2022	09/23/2022	09/23/2022	6:00	0.00	SEBASTIAN RIVER HIGH SCHOOL	80	10	0	0	2	Yes	View Duplicate Cancel
09/07/2022	09/14/2022	09/28/2022	1577833:30	45.00	FOCUS HIGH SCHOOL	30	0	0	0	1	No	View Duplicate Cancel
09/06/2022	09/08/2022	09/08/2022	5:30	145.50	FOCUS HIGH SCHOOL	25	2	0	0	1	Yes	View Duplicate Cancel

If your district is using School Provided Drivers, which is enabled via [Setup](#) > [Misc](#), drivers and driver aides can be assigned here.


4. From the Current Field Trip tab, scroll down to the **Pick-Ups/Drop-Offs** section to review drivers assigned or to assign drivers.

Pick-Ups/Drop-Offs							Generate
ity	Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type	Drivers
- +		48	1	0	0	Departure	<div>Ram Pending Accept Reject Delete Print</div> <div>Bon Pending Accept Reject Delete Print</div> <div>Mades Deleted Revert Print</div> <div>Earl Pending Accept Reject Delete Print</div> <div>Bra Deleted Revert Print</div> <div>Queue Pull Manually Assign</div>
- +	WITT GYM	0	0	0	0	Return	
+						Departure	

Scroll to the right to see the column called **Drivers**. The drivers that have been assigned display in the column next to each scheduled trip.

Next to each driver's name, displays a status, such as Pending, Accepted, Rejected, or Deleted.

5. Depending on the [Setup](#) of field trips, you may have the option to **Assign School Driver** and **Assign Driver Aide** by clicking the corresponding button.

Pick-Ups/Drop-Offs				Generate	
# WheelChairs	# Bus Aides	Type	Drivers		
1	1	Departure	Beatrix Lestrage	 Pending	<div>Accept</div> <div>Reject</div> <div>Delete</div> <div>Print</div>
			<div>Assign School Driver</div> <div>Assign Driver Aide</div>		
1	1	Return			
		Departure			

a. From the Manually Assign School Provided Driver or Manually Assign Bus Driver Aide pop-up window, select the driver/aide from the pull-down and click **Assign**. Click **Cancel** to return to the Current Field Trip tab.

X

Manually Assign School Provided Driver

Lestrage, Beatrix

Assign

Cancel

6. Scroll to the right to see the column called **Drivers**. The drivers that have been assigned display in the column next to each scheduled trip.

Pick-Ups/Drop-Offs			Generate
# Bus Aides	Type	Drivers	
1	Departure	<div> <div>Beatrix Lestrage</div> <div> Accepted <div>Revert</div> <div>Print</div> </div> </div> <div>Assign School Driver</div> <div> Driver Aides </div> <div> <div>Carp</div> <div> Pending <div>Accept</div> <div>Reject</div> <div>Delete</div> <div>Print</div> </div> </div>	
1	Return		
	Departure		

Next to each driver's name, displays a status, such as Pending, Accepted, Rejected, or Deleted.

7. Click **Print** to print the Driver Acceptance Form.

Modules.php

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Driver Acceptance Form

MB604-Transportation Field Trip (2019)

One-Time Trip #1285

1707 16TH ST

FL 32

Ker ynn

Depart: 08/28/2019 03:10PM

0031 To

As of: 08/08/2019 02:42PM

Status: Assignment

Type: Regular

Sponsoring Org: Athletics

Return: 08/28/2019 07:30PM

Elapsed Time: 04:20

Total Stds: 48

Adts: 1

Whls: 0

Whls Aides: 0

Transportation By: Sa eo 08/08/2019 02:42PM

Assignment By: Her ca S 08/08/2019 02:42PM

Bus: 001

Driver: 001

Driver: 7006 Sa

Drivers Signature: _____

On: _____

Date MM/DD/CCYY and Time

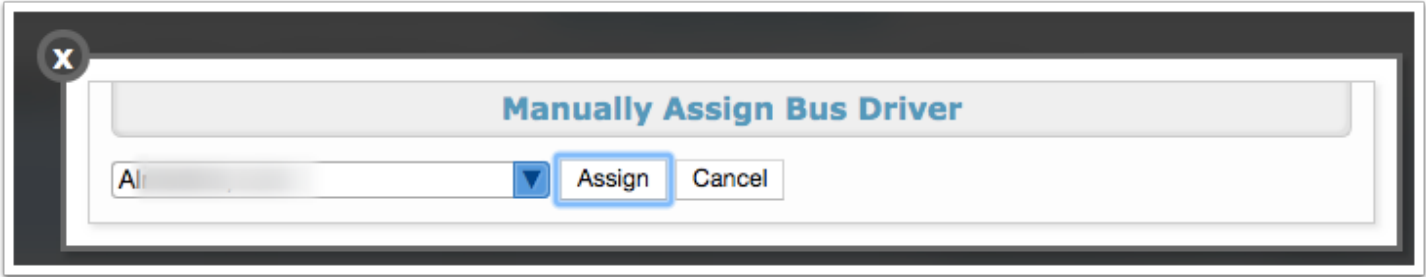
8. Based on the information completed on the Driver Acceptance Form, you can select from the following buttons: **Accept**, **Reject**, or **Delete**.

Once the Accept, Reject, or Delete button is selected, the **Revert** button displays allowing you to revert to the previous state.

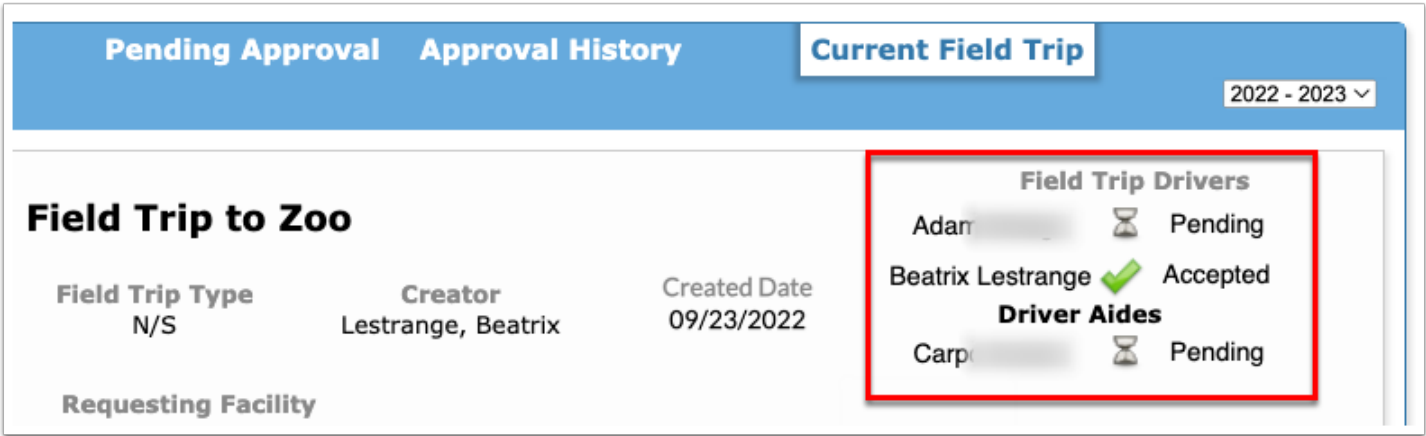
9. Once a driver is deleted, you must assign another driver. See step 5 or click **Queue Pull** to assign the next driver in line based on programmed union regulations. If the selected driver declines the trip, the next driver in line as per union regulations will be assigned the trip, and so

on. However, if the Queue Pull needs to be overridden, you have the option to **Manually Assign** drivers by clicking the corresponding button.

- a. When Manually Assign is selected, a Manually Assign Bus Driver pop-up is displayed. Select the driver from the pull-down and click **Assign**. Click **Cancel** to close the pop-up window and return to the Current Field trip tab.

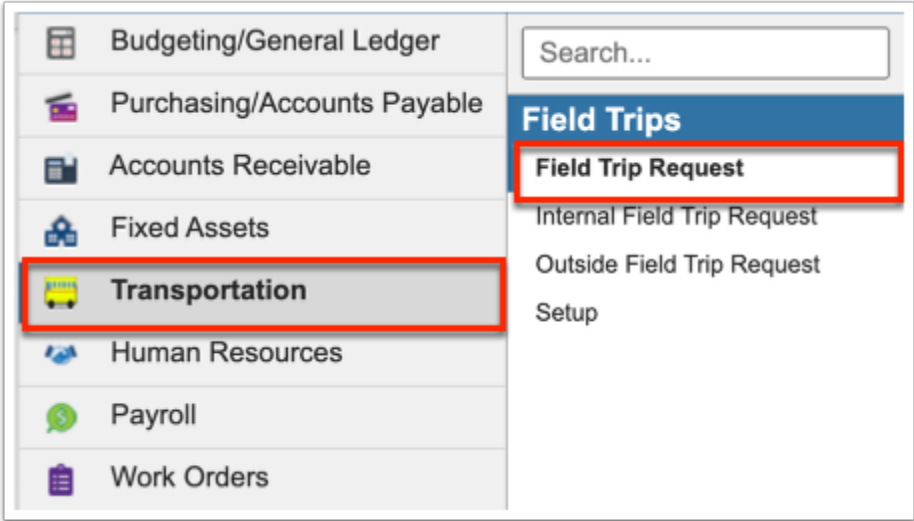


10. You can review **Field Trip Drivers** statuses in the upper right corner of the screen.



Complete Field Trip

- 1. In the **Transportation** menu, click **Field Trip Request**.



2. Click the **Field Trip History** tab.

The screenshot shows the 'Field Trip Request' interface. At the top left is the 'Writer's current' logo. Next to it is a 'Select Employee' dropdown menu. The main title is 'Field Trip Request'. Below this is a navigation bar with tabs: 'Transportation', 'Setup', 'Employee Self Service', 'Forms', and 'Reports'. Underneath this is another set of tabs: 'Drafts', 'Templates', 'Field Trip History' (highlighted with a red box), 'Pending Approval', 'Approval History', and 'Current'. Below the tabs is a search bar with 'Field Trip History' entered. At the bottom left, there are two buttons: 'Hide All Users' and 'All Facilities' with a dropdown arrow.

3. Once the field trip request has been approved and taken place, click the **View** button next to applicable field trip.

The screenshot shows the 'Field Trip History' table. The table has columns: Created Date, Start Date, End Date, Total Hours, Cost, Requesting Facility, # of Students, # of Adults, # of Wheelchairs, # of Bus Aides, # of Buses, and Completed. The first row is highlighted, and the 'View' button next to it is highlighted with a red box. The table also includes pagination controls (Page: 1 / 8, 149 Records) and an 'Export' button.

Created Date	Start Date	End Date	Total Hours	Cost	Requesting Facility	# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	
09/23/2022	09/23/2022	09/23/2022	5:30	1,237.50	FOCUS HIGH SCHOOL	175	15	0	0	5	No	View Duplicate Cancel
09/22/2022	09/23/2022	09/23/2022	6:15	562.50	FOCUS HIGH SCHOOL	70	15	0	0	2	No	View Duplicate Cancel
09/19/2022	09/22/2022	09/22/2022	5:00	225.00	FOCUS HIGH SCHOOL	30	1	0	0	1	No	View Duplicate Cancel
09/19/2022	09/20/2022	09/20/2022	3:00	135.00	SUPERINTENDENT'S OFFICE	35	0	0	0	1	No	View Duplicate Cancel
09/19/2022	09/20/2022	09/20/2022	3:00	135.00	SUPERINTENDENT'S OFFICE	35	0	0	0	1	No	View Duplicate Cancel
09/15/2022	10/07/2022	10/07/2022	3:45	168.75	SEINFELD RIVER MIDDLE SCHL	26	3	0	0	1	No	View Duplicate Cancel
09/13/2022	09/29/2022	09/29/2022	5:00	225.00	FOCUS HIGH SCHOOL	21	1	0	0	1	No	View Duplicate Cancel
09/12/2022	09/23/2022	09/23/2022	6:00	0.00	SEBASTIAN RIVER HIGH SCHOOL	80	10	0	0	2	Yes	View Duplicate Cancel
09/07/2022	09/14/2022	09/28/2022	1577833:30	45.00	FOCUS HIGH SCHOOL	30	0	0	0	1	No	View Duplicate Cancel
09/06/2022	09/08/2022	09/08/2022	5:30	145.50	FOCUS HIGH SCHOOL	25	2	0	0	1	Yes	View Duplicate Cancel

4. From the Current Field Trip tab, the **Complete Field Trip** tab becomes available; click the tab to enter the remaining details in order to mark the trip as complete.

Writer's current Select Employee Field Trip Request Linda Lewis (Transport... SIS ERP

Transportation Setup Employee Self Service Forms Reports

Drafts Templates Field Trip History Pending Approval Approval History Current Field Trip Complete Field Trip 2022 - 2023

band to Sebastian High School 9/23

Number 5223	Field Trip Status Approved	Field Trip Type N/S	Creator Monte...	Created Date 09/23/2022	Submitted Date 09/23/2022 7:09am
Requesting Facility 0031 FOCUS HI...		Sponsoring Organization Band		Date 09/23/2022	Recurring <input type="checkbox"/>
# of Students 175	# of Adults 15	# of Wheelchairs 0	# of Bus Aides 0	# of Buses 5	
Requested By pe...@ind...s.org		Pick Up Contact PAGE	Final Destination 0031 FOCUS HI...+	Estimated Trip Miles 0	

Are To Go Lunches Required?
☐

Field Trip Drivers

Sara Anthony	Accepted
Publia Myers	Accepted
Lesmes Jurado	Accepted
Nayla Pacheco	Accepted
Tulla Kennedy	Accepted

The first section of the screen displays Approved Info from the field trip request.

Drafts Templates Field Trip History Pending Approval Approval History Current Field Trip Complete Field Trip 2022 - 2023

band to Sebastian High School 9/23

Approved Info

Number 5223	Field Trip Type N/S	Creator Montene...	Created Date 09/23/2022	Submitted Date 09/23/2022 7:09am
Requesting Facility 0031 FOCUS HIGH SCHOOL		Sponsoring Organization Band		Date 09/23/2022
Recurring No				
# of Students 175	# of Adults 15	# of Wheelchairs	# of Bus Aides	# of Buses 5
Requested By @i...ols.org		Pick Up Contact PAC... L - 564-5413	Final Destination 0031 FOCUS HIGH SCHOOL	

Finalized Info

# of Students 175	# of Adults 15	# of Wheelchairs 0	# of Bus Aides 0	# of Buses 5
----------------------	-------------------	-----------------------	---------------------	-----------------

Drivers/Aides

Bus #	Employee	Date	Starting Mileage	Ending Mileage	Arrive At	Returned At
-------	----------	------	------------------	----------------	-----------	-------------

5. To complete the field trip, you must complete the **Finalized Info** section.

Finalized Info

of Students

of Adults

of Wheelchairs

of Bus Aides

of Buses

Driver Pool

School Provided Drivers

of Star Seats

Drivers/Aides

Bus #	Employee	Role	Starting Mileage	Ending Mileage	Arrive At	Returned At
3	ERP Transportation-provided, Bus Driver For Field Trips	Driver	12000	12345	11:00 am	02:00 pm
3	ERP Transportation-provided, Bus Driver For Field Trips	Driver				
2	ERP Transportation-provided, Bus Driver For Field Trips	Driver				

Total Mileage

Final Cost

6. The **# of Students**, **# of Adults**, **# of Wheelchairs**, **# of Bus Aides**, the **# of Buses**, the **# of Star Seats** as well as the **Driver Pool** and **School Provided Drivers** pulls from the original request. Edit these numbers as needed to ensure the numbers are accurate and up-to-date.

7. Upon completing the trip, the drivers will submit the required documentation regarding the trip in order to complete the **Drivers** section. Once submitted, enter the **Bus #**, **Starting Mileage**, **Ending Mileage**, the **Arrive At** time, and the time the bus **Returned At** in the corresponding text boxes.

Drivers/Aides

Bus #	Employee	Role	Starting Mileage	Ending Mileage	Arrive At	Returned At
12	ERP Transportation-provided, Bus Driver For Field Trips	Driver	1000	1030	09:00 am	11:30 am
5	ERP Transportation-provided, Bus Driver For Field Trips	Driver	1200	1240	08:30 am	11:00 am

Total Mileage

Final Cost

As the Drivers information is entered, the **Total Mileage** and **Final Cost** fields are updated.

i If the trip is a recurring field trip, the Finalized Info section displays for each trip, which can be used to record data from the driver and allow a collection of funds to be made from the school to transportation. Each recurring trip can be completed separately, after which, an unofficial invoice can be generated/printed.

Finalized Info for 7/10/2019

of Students

20

of Adults

2

of Wheelchairs

0

of Bus Aides

0

of Buses

1

Drivers

Bus #	Employee	Starting Mileage	Ending Mileage	Arrive At	Returned At
1	Alm	55000	55100	08:00 am	01:30 pm

Total Mileage

100

Final Cost

165

Print Unofficial Invoice

Finalized Info for 7/11/2019

of Students

20

of Adults

2

of Wheelchairs

0

of Bus Aides

0

of Buses

1

Drivers

Bus #	Employee	Starting Mileage	Ending Mileage	Arrive At	Returned At
	Ande				

8. If the district has enabled additional expenses, enter **Sunpass** expenses and **Other Expenses** in the provided text boxes.

Finalized Info

of Students

20

of Adults

2

of Wheelchairs

of Bus Aides

1

of Buses

1

of Star Seats

0

Drivers/Aides

No Records Found

Sunpass

\$12.00

Other Expenses

\$15.00

Meals Per Day

7

Breakfast \$66.5

Lunch \$0

Dinner \$0

Total Meal Cost: \$66.5

Total Mileage

40

Final Cost

93.5

Print Unofficial Invoice

Complete Collection

Cancel Collection

9. If applicable, enter the number of **Meals Per Day** in the provided text boxes for **Breakfast**, **Lunch**, and **Dinner**. The total cost calculates based on the amounts entered via Transportation > [Setup](#) > [Billing](#) tab.

Field Trip Request

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Drivers/Aides

No Records Found

Meals Per Day

☒ Breakfast \$66.5

☐ Lunch \$0

☐ Dinner \$0

Total Meal Cost: \$66.5

Sunpass

\$12.00

Other Expenses

\$15.00

Total Mileage

40

Final Cost

93.5

Print Unofficial Invoice

Complete Collection

Cancel Collection

As the finalize information is entered, the **Total Mileage** and **Final Cost** fields are updated.

10. Once all of the information has been entered, click **Complete Collection** to allow for a collection of funds to be made from the school to transportation.

11. Click **Print Unofficial Invoice** to print an invoice to be sent to the applicable party responsible for payment. Districts can use the invoice as documentation upon receiving funds from the responsible party.

12. Click **Cancel Collection** to cancel the collection of funds.

Drivers/Aides

Bus #	Employee	Role	Starting Mileage	Ending Mileage	Arrive At	Returned At
12	ERP Transportation-provided, Bus Driver For Field Trips	Driver	1000	1030	09:00 am	11:30 am
5	ERP Transportation-provided, Bus Driver For Field Trips	Driver	1200	1240	08:30 am	11:00 am

Total Mileage

70

Final Cost

125

Print Unofficial Invoice

Complete Collection

Cancel Collection

a. Once canceled, click **Uncancel Collection** to reopen billing and apply the collection of funds, if applicable.

Cancelled

Finalized Info

of Students:
 # of Adults:
 # of Wheelchairs:
 # of Bus Aides:
 # of Buses:
 Driver Pool:

School Provided Drivers:
 # of Star Seats:

Drivers/Aides

Bus #	Employee	Role	Starting Mileage	Ending Mileage	Arrive At	Returned At
12	ERP Transportation-provided, Bus Driver For Field Trips	Driver	1000	1030	09:00 am	11:30 am
5	ERP Transportation-provided, Bus Driver For Field Trips	Driver	1200	1240	08:30 am	11:00 am

Total Mileage:
 Final Cost:
[Print Unofficial Invoice](#)
[Uncancel Collection](#)

13. The Allocations established in the [Allocations](#) section of [Creating a Field Trip Draft](#) are pulled in to the final field trip data; however, accounting strips can be edited as needed before completing the field trip. Once completed, allocations cannot be edited.

Allocations												
Facility	Department	Fund	Function	Object	Project	Program	Budgeted	Committed	Encumbered	Expended	Balance	Amount
												240.00
9032 ...	30 : LIBER...	921 : ...	9100 : ...	3310 ...	9933 ...							240.00
											Total	240.00

a. To edit accounts, click the pull-downs to change selections or click into any of the text fields that are underlined in blue.

b. Click the **delete** button to delete an accounting strip and add new information.

The Billing section displays accounts defined via [Setup](#) > [Billing](#), which are the accounts that will be utilized in order to pay transportation for salary, fuel, etc.

Billing							
Account	Facility	Department	Fund	Function	Revenue	Object	
Salary	9008 : TRANSPORTATION	00 : UNASSIGNED	100 : GENERAL OPERATING FUND - 100	7800 : PUPIL TRANSPORTATION SERVICES		1090 : SALARY R	
Fuel	9008 : TRANSPORTATION	00 : UNASSIGNED	100 : GENERAL OPERATING FUND - 100	7800 : PUPIL TRANSPORTATION SERVICES		4690 : DIESEL FL	

The percentage of payment is also defined via [Setup](#) > [Billing](#) but can be edited as needed by click the blue underlined text field.

Billing						
Project	Project	Program	Internal Account	Internal Sub-Account	Internal Project	Percent
90 : SALARY REIMBURSEMENT	1999 : GENERAL FUND - DISCRETIONARY					66.67
90 : DIESEL FUEL REIMBURSEMENT	1702 : GENERAL - TRANSPORTATION FUEL					33.33

14. If needed, you can attached documents to the field trip via the Files section, such as driver forms.

a. As indicated in the Files section, drag files directly into the box to attach documents or click the **Select** button to browse for files. Click the **Scan File** button for direct scanning; this will prompt you to download Dynamsoft. This is a one-time download that allows you to attach files directly from your scanner. In doing so, you will bypass saving the file to your computer first.

15. Post any necessary Comments. The comments left here are for internal use only, meaning only other staff members will have access. Comments will not print on the receipt.

a. To post a comment, enter your comment in the text box and click **Post**.

16. From this screen, you can also **Print Unofficial** documentation by clicking the corresponding button.

Allocations

Facility	Department	Fund	Function	Object	Project	Program	Budgeted	Committed	Encumbered	Expended	Balance	Amount
0031 : FO...	00 : UNASSI...	100 : GEN...	7830 : BA...	3310 : ST...	1999 : GE...							1237.50
Total											1,237.50	

Billing

No Records Found

JE Number

Calendar

Workers Comp Rate

Files
(Drag files to upload)

Print Unofficial

- a. To print, click the **printer** icon located in the upper right corner of the screen.
- b. Click the **down arrow** to download the image as a PDF file.

Modules.php

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band to Sebastian High School 9/23

2023-07-03

Field Trip Request

Number	Creator	Created Date	Date Range	Recurring
5223	Mont...	2022-09-23	2022-09-23 – 2022-09-23	No

Field Trip Status	# of Students	# of Adults	# of Wheelchairs	# of Buses
A	175	15	0	5

Locations

Pick Up				Drop Off			
Date	Time	Facility	Location	Date	Time	Facility	Location
2022-09-23	05:00 pm	0031 FOCUS HIGH SCHOOL	FRONT OF PAC	2022-09-23	05:30 pm	0291 SEBASTIAN RIVER HIGH SCHOOL	FOOTBALL FIELD
2022-09-23	10:00 pm	0291 SEBASTIAN RIVER HIGH SCHOOL	FOOTBALL FIELD	2022-09-23	10:30 pm	0031 FOCUS HIGH SCHOOL	FRONT OF PAC

Allocations

Additional Features

Click the **Excel** icon in the Export section to export the table of data to an Excel spreadsheet, which can then be saved to your computer.

Click the **Printer** icon to print the table of data.

Writer's current

Select Employee ▼ Field Trip Request

Drafts Templates **Field Trip History**

Field Trip History

Hide All Users

All Facilities ▼

< Prev

Page: 1 / 10

Next >

187 Records

Export

Filter: OFF

Creator	Name	Number
Montenegro	band to Sebastian High School 9/23	522
Torrez, E	SES, ESE Jensen Children's Museum	522
Posada	2023-2nd Grade FT	522
Valentin, /	V Fball to CHS / SoCo Stadium 10/14	522
Valentin,	VBHS Swim to GYAC Daily	522
Montenegro	OCTOBER AM SHUTTLE BUS FOR STUDENTS FROM THE FLC TO BE BROUGHT TO MC	522
Montenegro	AFTER SCHOOL BUS FOR OCTOBER	522

If there are multiple pages of data, click the **Prev** and **Next** buttons to sift through pages. You can also enter a number in the **Page** text box to jump to a page.

Drafts Templates **Field Trip History**

Field Trip History

Hide All Users

All Facilities ▼

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Page: 2 / 10

Next >

187 Records

Export

Filter: OFF

Creator	Name	Number	Type	Status	Created Date
Bonilla	Volleyball/Soccer	5190	District	Approved	09/19/2022
Bonilla	Volleyball/Soccer	5192	District	Pending	09/19/2022
Bonilla	Volleyball/Soccer	5193	District	Pending	09/19/2022
Chapa,	SRHS Commissioner's meeting	5195	District	Approved	09/19/2022

Click the **Filters** button to filter data and apply filter rules.


- To add more than one filter to a column, click on the **green plus sign**.
- To delete an added filter, click on the **red minus sign**.
- Select the **gray arrow** for additional filtering rules.

Field Trip History

Hide All UsersAll Facilities

< PrevPage: 1 / 6Next >118 RecordsExportFilter: ON

End Date	Total Hours	Cost	Requesting Facility	Contains	Not	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	
09/23/2022	5:30	1,237.50	FOCUS HIGH SCHOOL	Starts with	Not	0	0	5	No	View Duplicate Cancel
10/27/2022	4:15	191.25	SEBASTIAN ELEMENTARY	Ends with	Not	0	0	1	No	View Duplicate Cancel
10/14/2022	7:00	630.00	FOCUS HIGH SCHOOL	Has value	Not	0	0	2	No	View Duplicate Cancel
10/20/2022	2:45	123.75	FOCUS HIGH SCHOOL	Greater	Not	0	0	1	No	View Duplicate Cancel
10/31/2022	3:30	157.50	FOCUS HIGH SCHOOL	Greater or equal	Not	0	0	1	No	View Duplicate Cancel
10/27/2022	2:45	123.75	SEBASTIAN ELEMENTARY	Less	Not	0	0	1	No	View Duplicate Cancel
09/23/2022	6:15	562.50	FOCUS HIGH SCHOOL	Less or equal	Not	0	0	2	No	View Duplicate Cancel
09/23/2022	6:15	281.25	FOCUS HIGH SCHOOL	Between	Not	0	0	1	No	View Duplicate Cancel

 For more information on how to use the Filters feature, see the [Filters](#) document.

You can also sort data by clicking on any of the headers. Click once for ascending results; click twice for descending results. In the image shown, data has been sorted by clicking Name once.

Field Trip History												
Hide All Users		All Facilities										
Page: 1 / 10		Next >		187 Records		Export		Filter: OFF				
Number	Type	Status	Created Date	Start Date	End Date	Total Hours	Cost	Requesting Facility	# of Students	# of Adults	# of Wheelchairs	# of Bus
5223	District	Approved	09/23/2022	09/23/2022	09/23/2022	5:30	1,237.50	FOCUS HIGH SCHOOL	175	15	0	0
5203	District	Pending	09/21/2022	10/01/2022	10/01/2022	8:30	1,530.00	SEBASTIAN RIVER HIGH SCHOOL	145	15	0	0
5107	District	Pending	08/25/2022	10/14/2022	10/14/2022	5:45	1,035.00	FOCUS HIGH SCHOOL	130	15	0	0
5149	District	Approved	09/02/2022	09/16/2022	09/16/2022	3:15	438.75	LIBERTY ELEMENTARY	116	15	0	0
5225	District	Pending	09/23/2022	10/27/2022	10/27/2022	2:45	371.25	KRAMER	110	7	0	0
5145	District	Approved	09/01/2022	09/30/2022	09/30/2022	2:30	225.00	ROSEWOOD ELEMENTARY	93	8		
4956	District	Approved	07/01/2022	07/01/2022	07/01/2022	1:00	285.00	FOCUS COAST ELEMENTARY	90	0	0	2
4959	District	Approved	07/01/2022	07/01/2022	07/01/2022	1:00	222.50	FOCUS COAST ELEMENTARY	90	0	0	2
5156	District	Pending	09/07/2022	09/13/2022	10/27/2022	8:45	787.50	SEINFELD RIVER MIDDLE SCHL	90	0	0	0
5109	District	Approved	08/26/2022	09/13/2022	09/29/2022	7:30	675.00	SEINFELD RIVER MIDDLE SCHL	90	0	0	0

Use the **Filter** text box located in select pull-down to quickly find a selection. Begin typing the name or number of the data in question to pull it to the beginning of the list.

Field Trip History

Hide All Users

All Facilities

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Number	Type	Facil
5223	District	0031 FOCUS HIGH SCHOOL
5203	District	0033 FOCUS PREP
5107	District	0141 FOCUS ELEMENTARY
5149	District	0341 FOCUS COAST ELEMENTARY
5225	District	4341 FOCUS COAST ELEM FOOD SRV
5145	District	6341 FOCUS COAST 21ST CENTURY
4956	District	8341 FOCUS COAST ELEM EXT DAY
		0341S SS - Focus Coast Elementary
		TCPK CUSCANDEN PARK
		TFOC FL OCEANOGRAPHIC COASTAL CENTE
4959	District	Approved 07/01/2022 07/01/2022 07/01/2022 1:00 222.50 FOCUS COAST I