# Internal Field Trip Request

The Internal 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**.
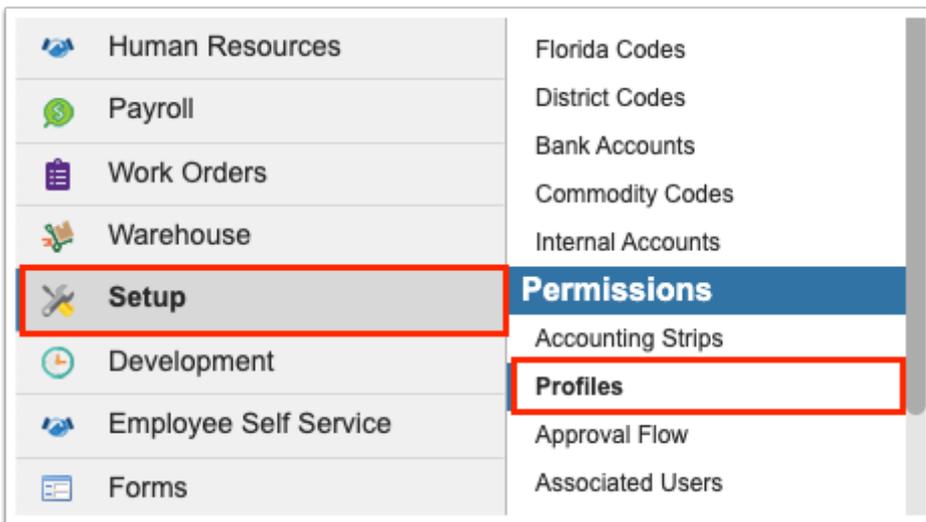
2. The Profiles screen defaults to the **Permissions** tab.
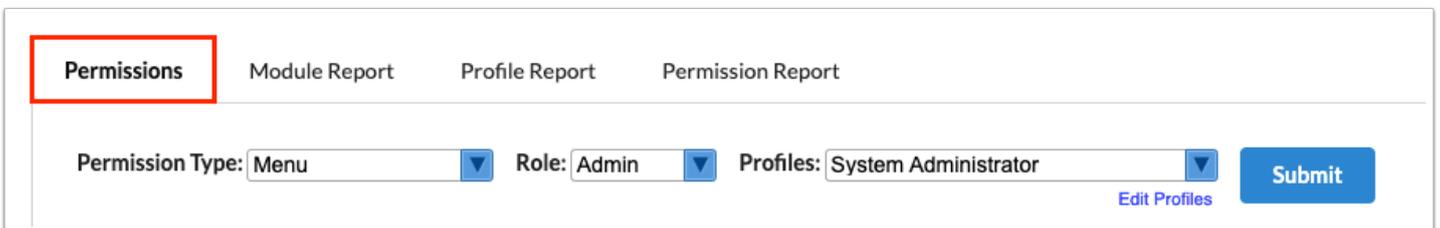
3. Select **Menu** from the **Permission Type** pull-down.

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.

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

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

Close Fieldtrips: Select the **View** check box to gives users the ability to close/complete field trips by clicking the Complete Collection button on 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.

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**.

> ℹ️ See [Profiles](#) for more information.

Creating an Internal Field Trip Request Draft

1. In the **Transportation** menu, click **Internal 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 create a new draft, start be entering a field trip request name in the provided text box. Then, click **Create**.

General Field Trip Information

Upon clicking Create, you will 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.

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.

Pick-Ups/Drop-Offs

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

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.

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.

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.

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.

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.

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.

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.

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.

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

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a. To print, click the **printer** icon located in the upper right corner of the screen.

b. To rotate the image, you can click the **circular arrow** (the 1st icon that appears in the upper right corner of the screen). Click the **down arrow** to download the image as a PDF file.

Viewing Existing Field Trip Drafts

1. In the **Transportation** menu, click **Internal Field Trip Request**.
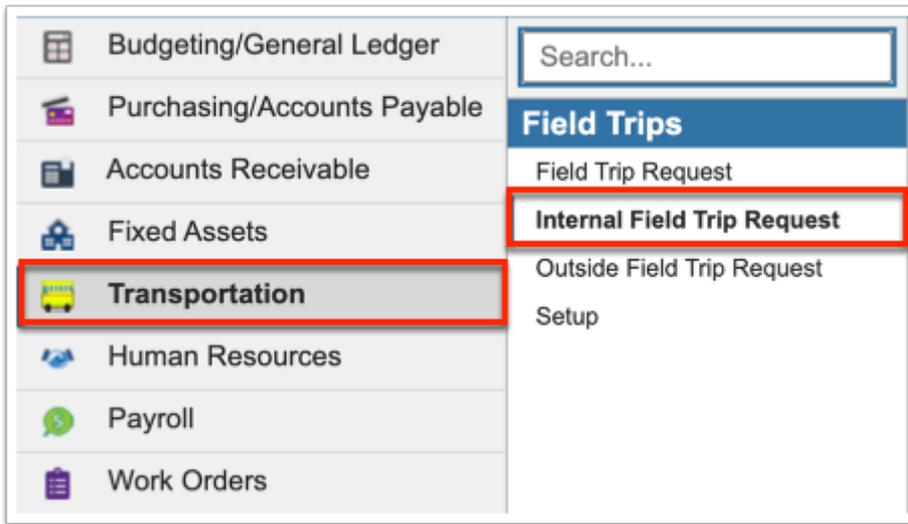
2. From the Drafts tab, you can create a new field trip draft as well as continue editing Existing Drafts. Before continuing, be sure the correct fiscal year is selected from the pull-down; it defaults to the current year.
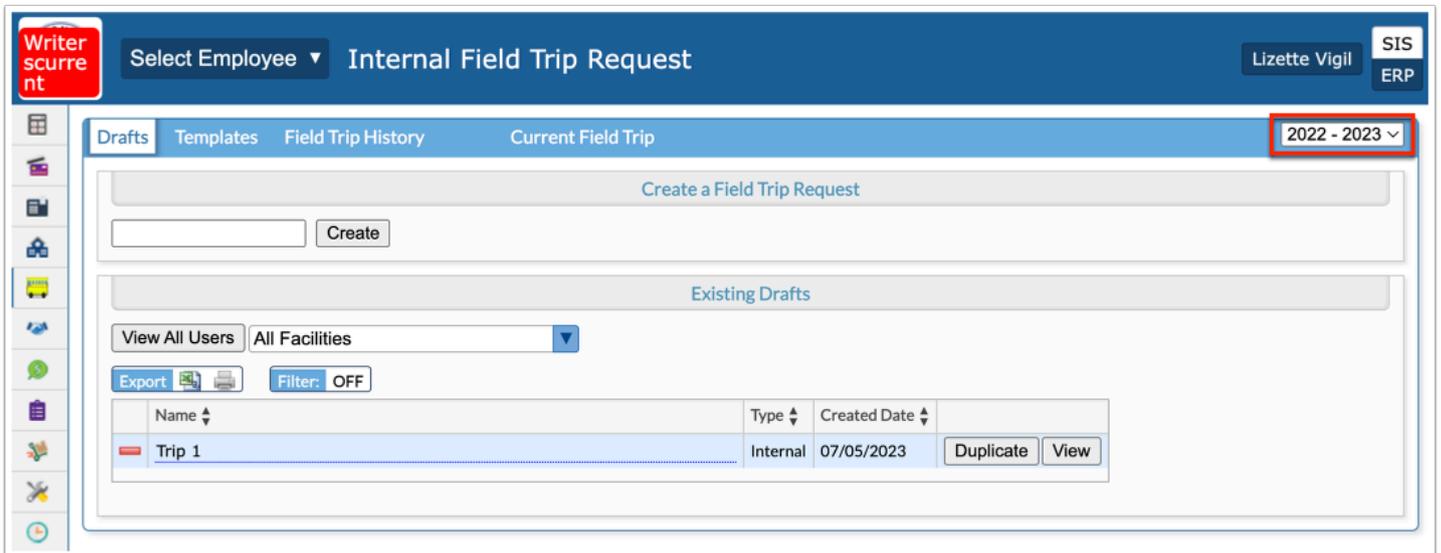
3. To **View All Users** who have started a draft, click the corresponding button. Note: Only select users have permission to view all users' drafts.

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

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

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.

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 an Internal Field Trip Request Draft. Click the **Drafts** tab to return to the drafts.

7. To create a copy of an existing draft, click the **Duplicate** button.
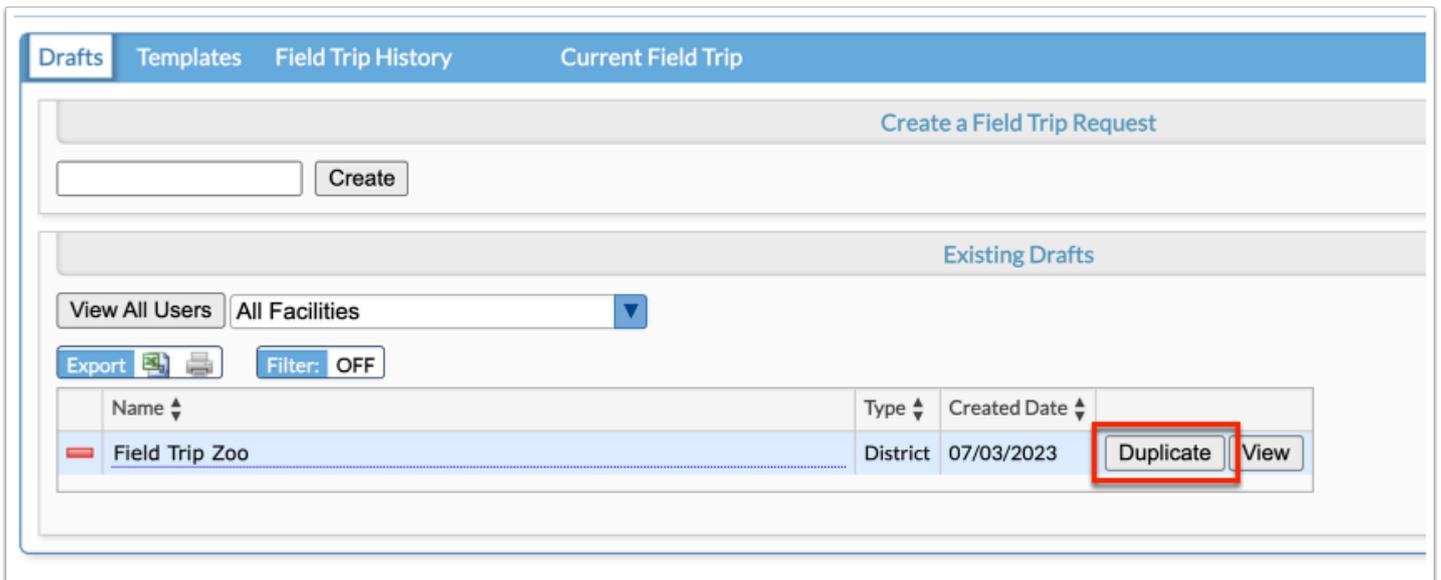
a. Upon clicking Duplicate, you will be prompted to enter a new draft title. Click **OK** when done or click **Cancel** to return the Drafts tab.
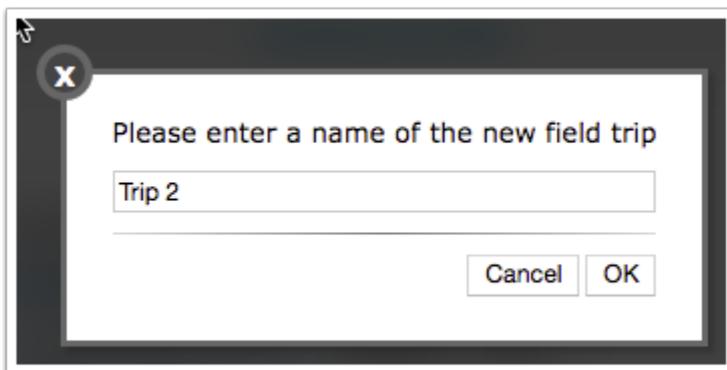
The copy created opens in the Current Field Trip tab. For more information on completing a Field Trip Request, see Creating an Internal Field Trip Request Draft. Click the **Drafts** tab to return to the drafts.

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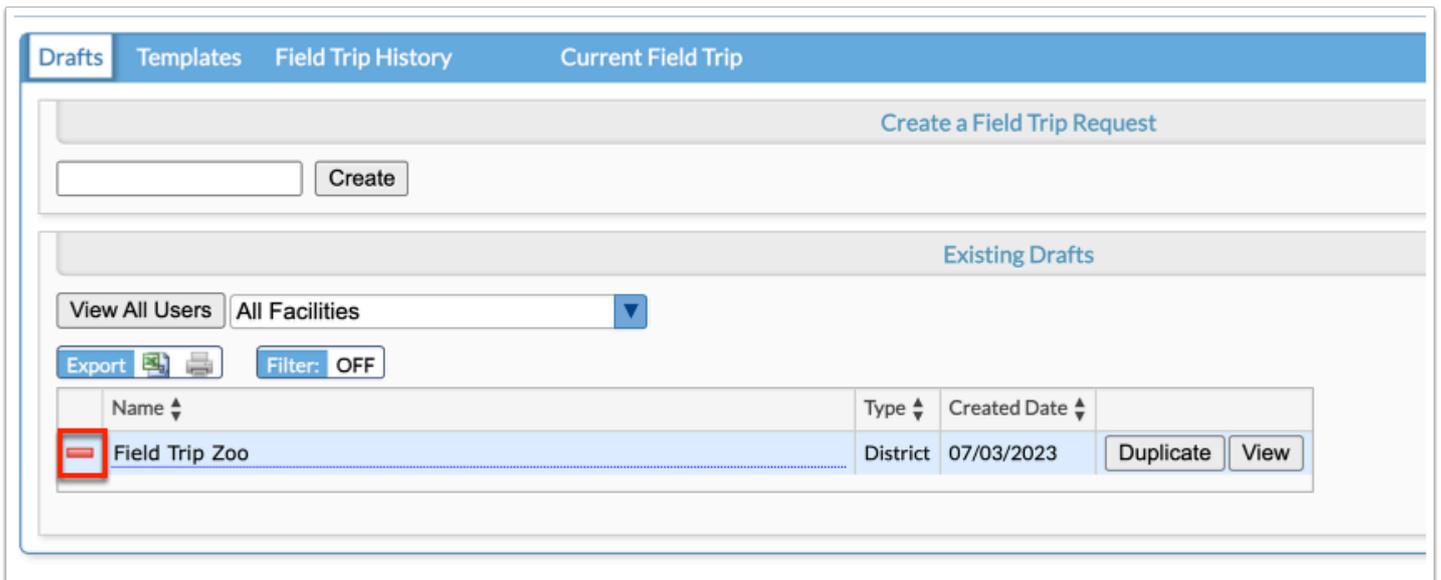
Templates

1. In the **Transportation** menu, click **Internal Field Trip Request**.
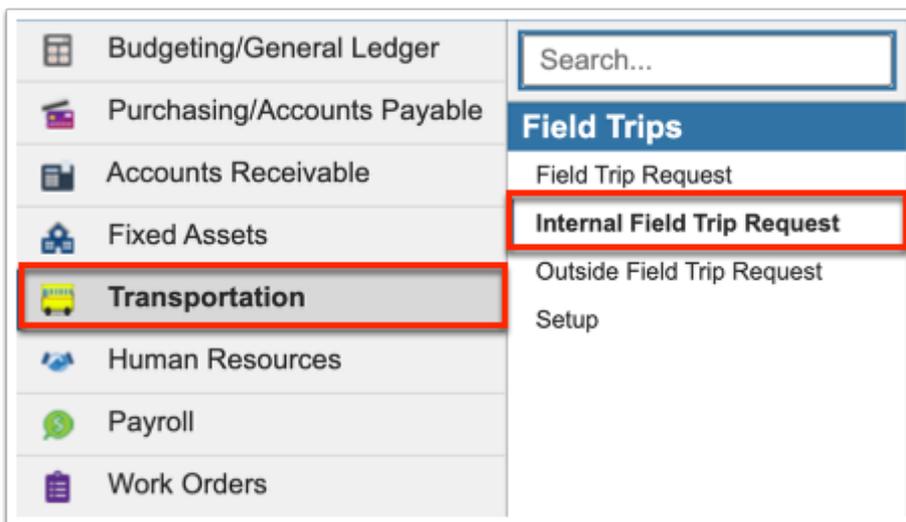
2. Click the **Templates** tab to create a template that can be used to create field trip requests as many times as needed.
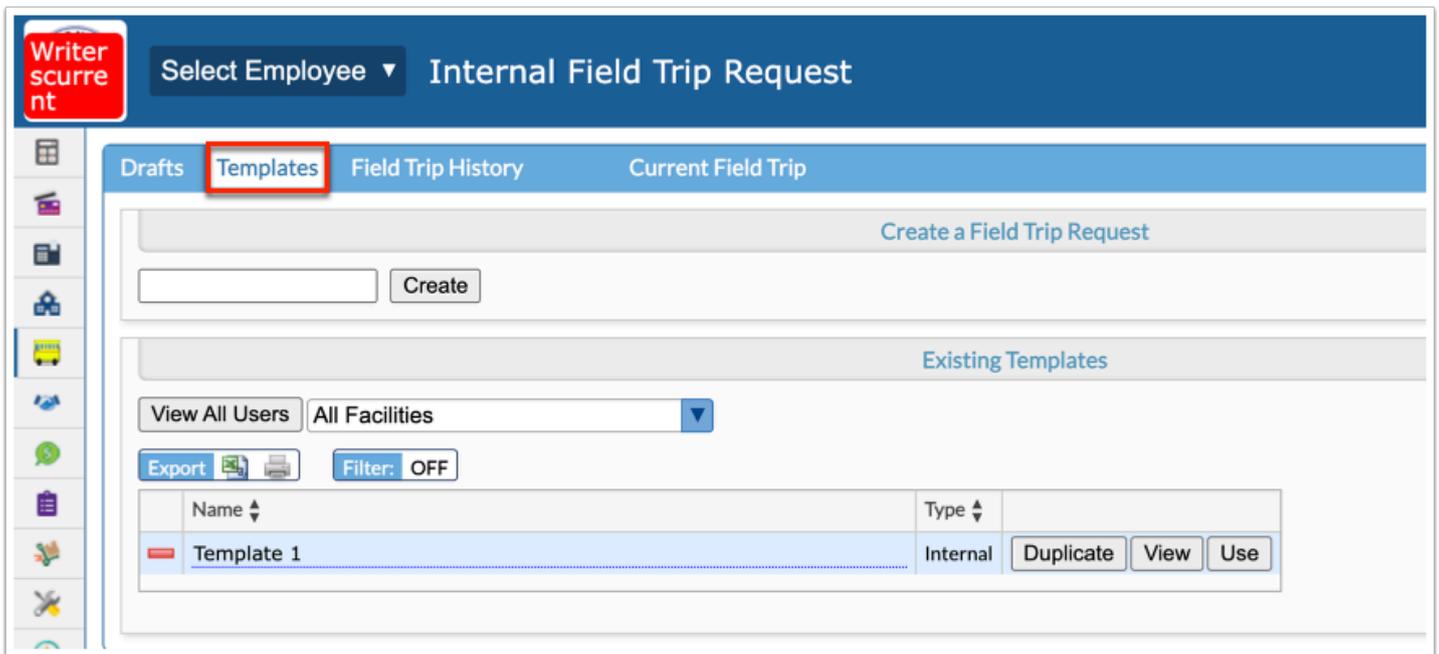
3. From the Templates tab, you can create a new template as well as continue editing Existing Templates. Before continuing, be sure the correct fiscal year is selected from the pull-down; it defaults to the current year.
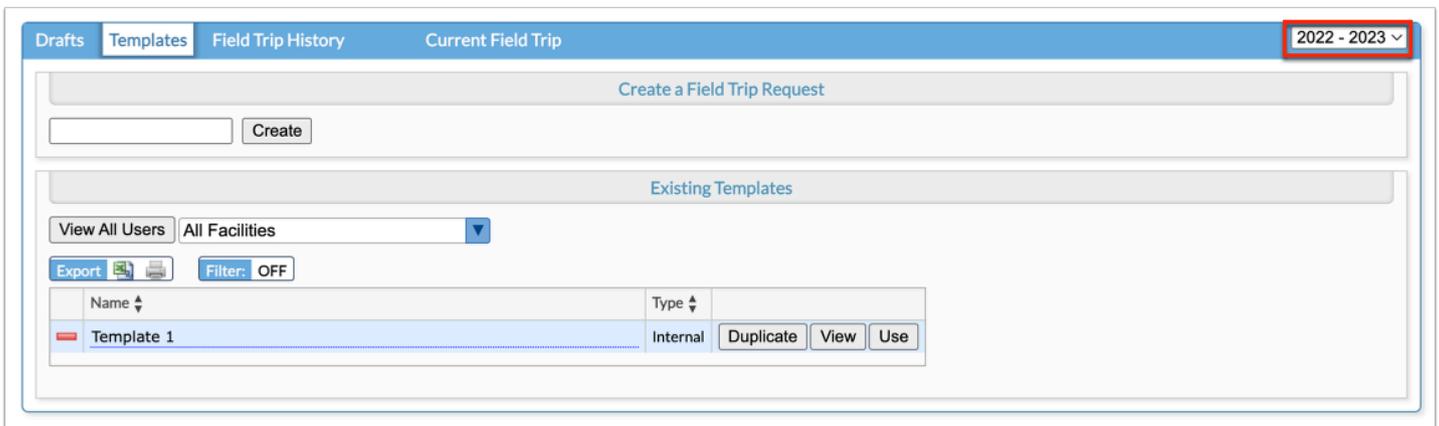
4. Name the template and click **Create**.
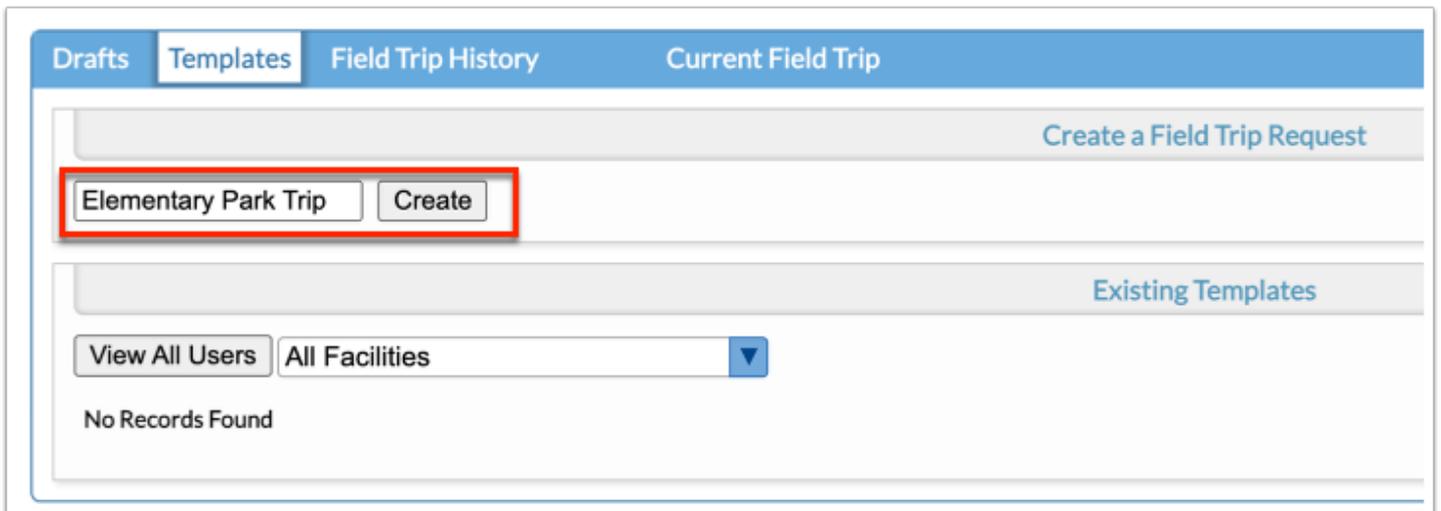
5. Enter as much information as desired in order for other users to create field trip requests starting with **# of Buses**. The rest of the information in the top section can only be completed upon creating a draft.

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.
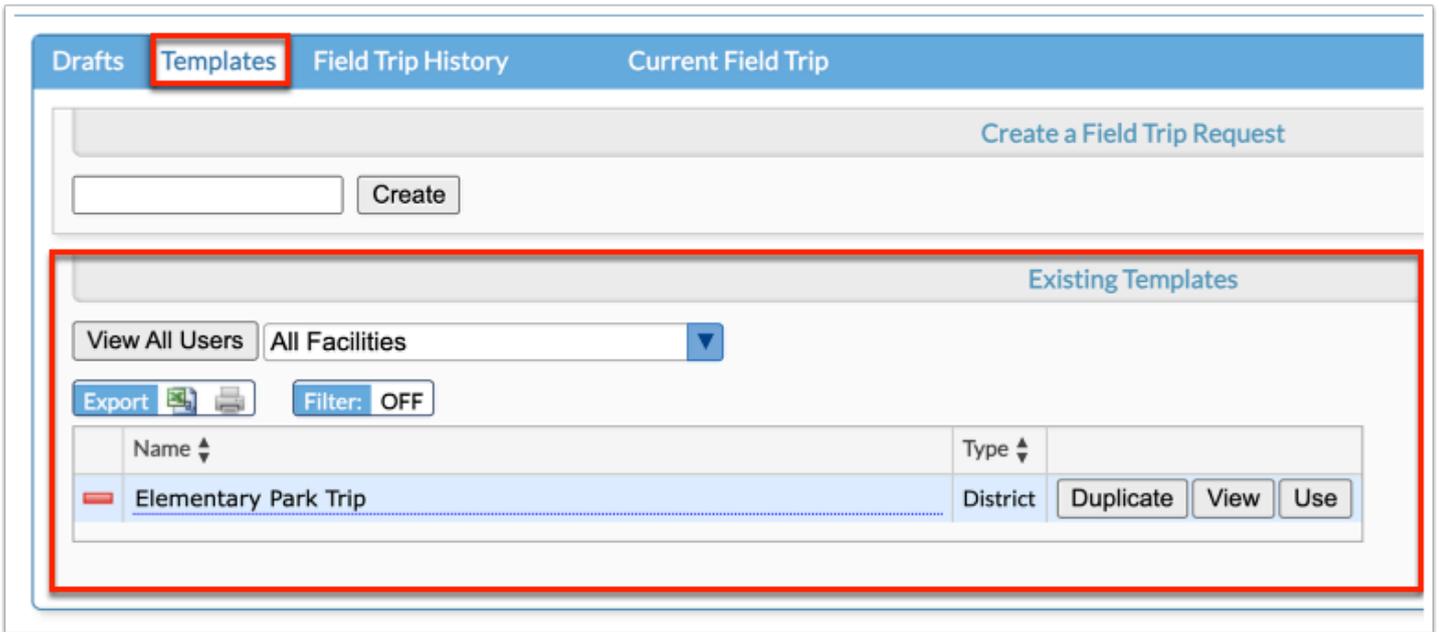
9. To view templates created by other users, click **View All Users**.
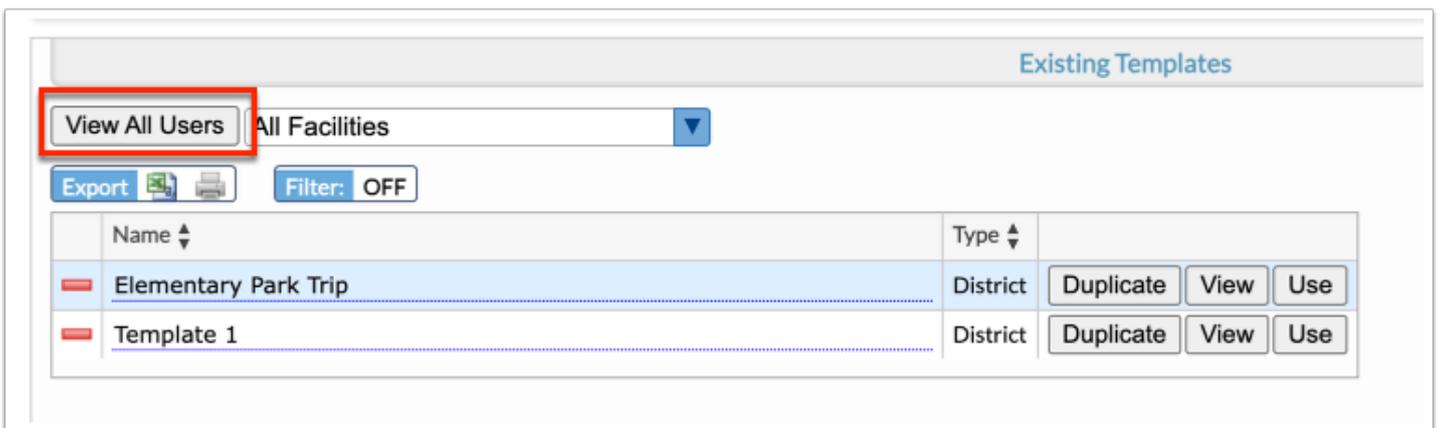
  a. To **Hide All Users** and display templates only you created, click the corresponding button.
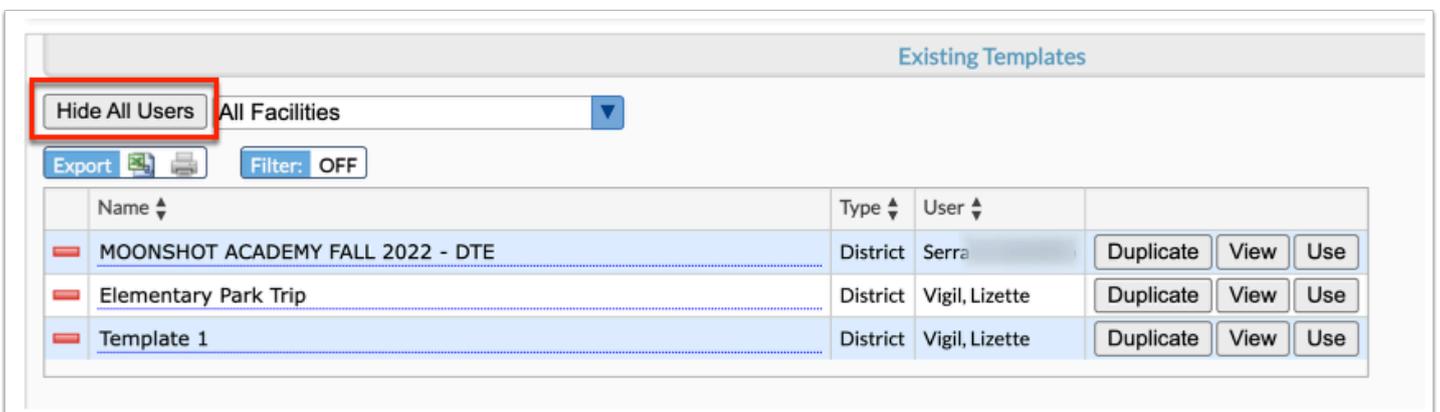
10. To view templates applicable to a specific facility, select te facility from the provided pull-down. The pull-down defaults to All Facilities.
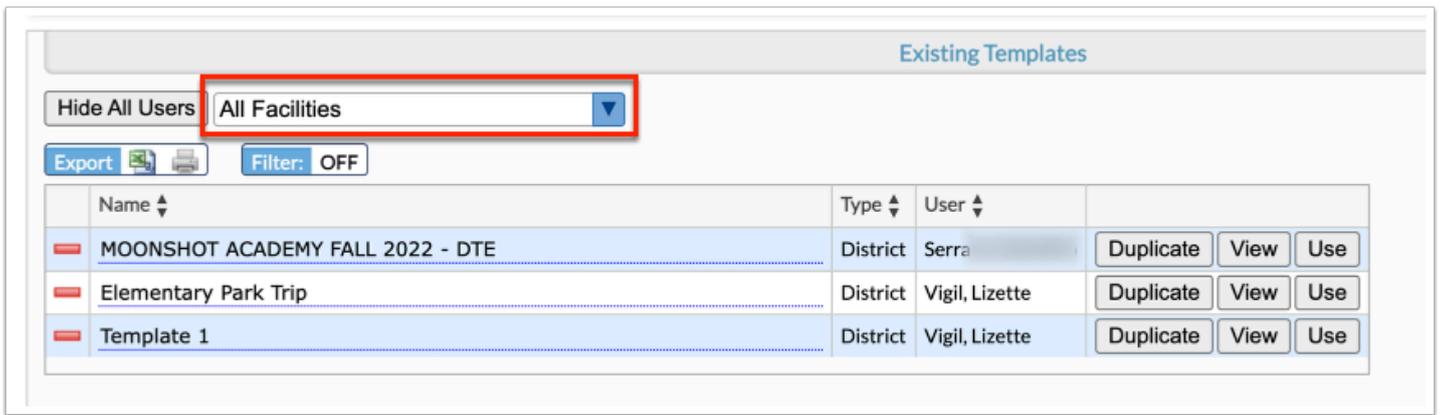
11. Once the template has been created, you can click the text underlined in blue to edit the **Name**.
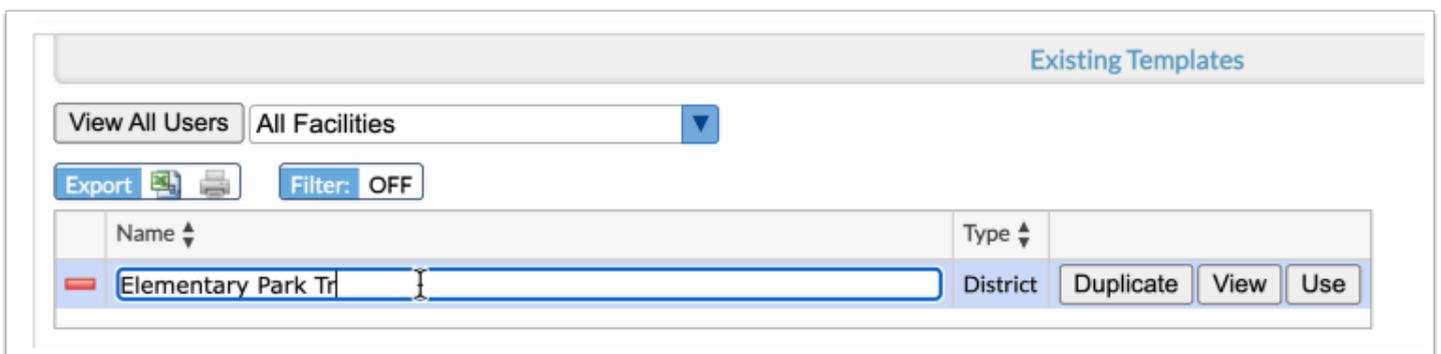
12. To create a copy of the template and edit it as needed for other uses, click the **Duplicate** button.

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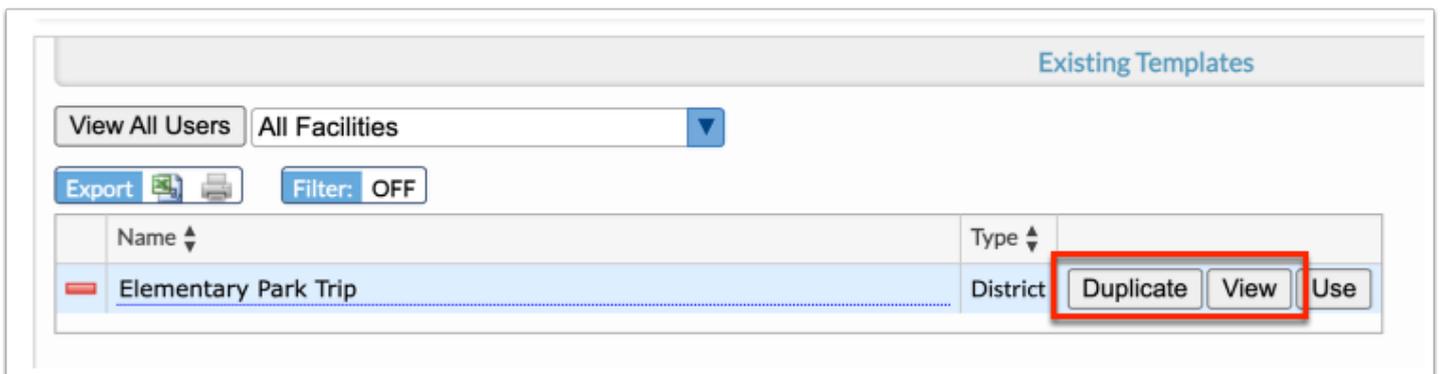
14. Click the **Use** button to use the template and create a field trip request draft. Once Use is clicked, you will be prompted to enter a name of the new field trip request draft.

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

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.

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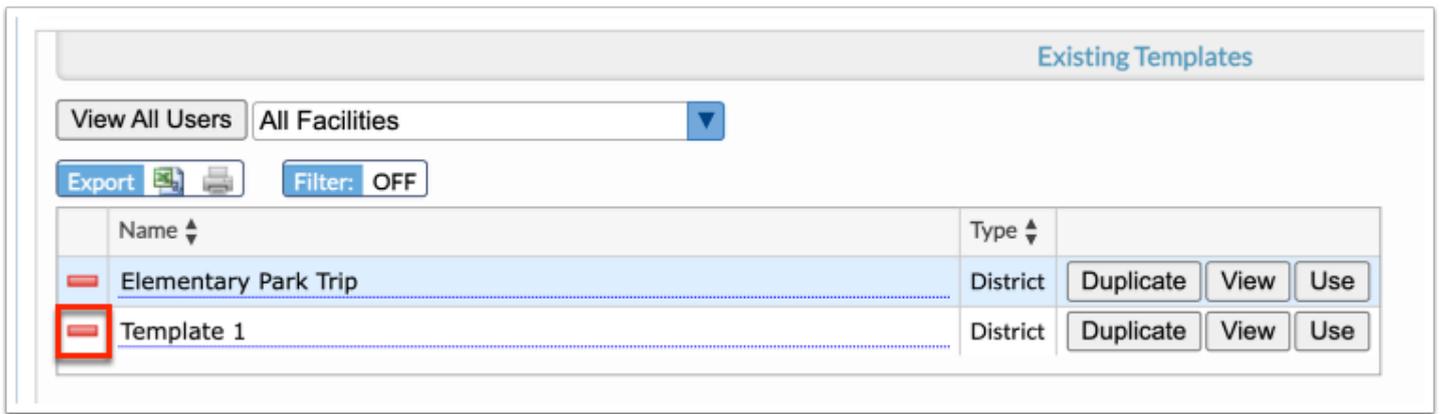
Field Trip History

1. In the **Transportation** menu, click **Internal Field Trip Request**.
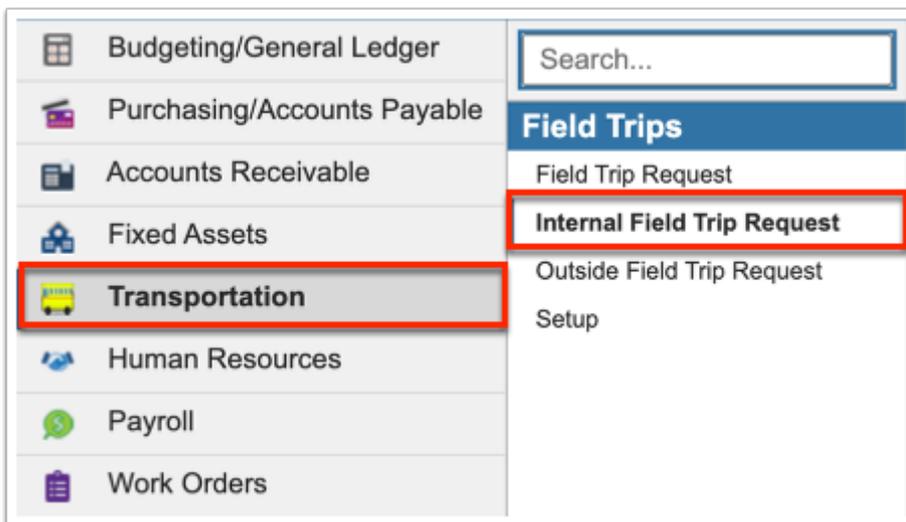
2. Once a field trip request has been submitted, click the **Field Trip History** tab to view the status of the request.
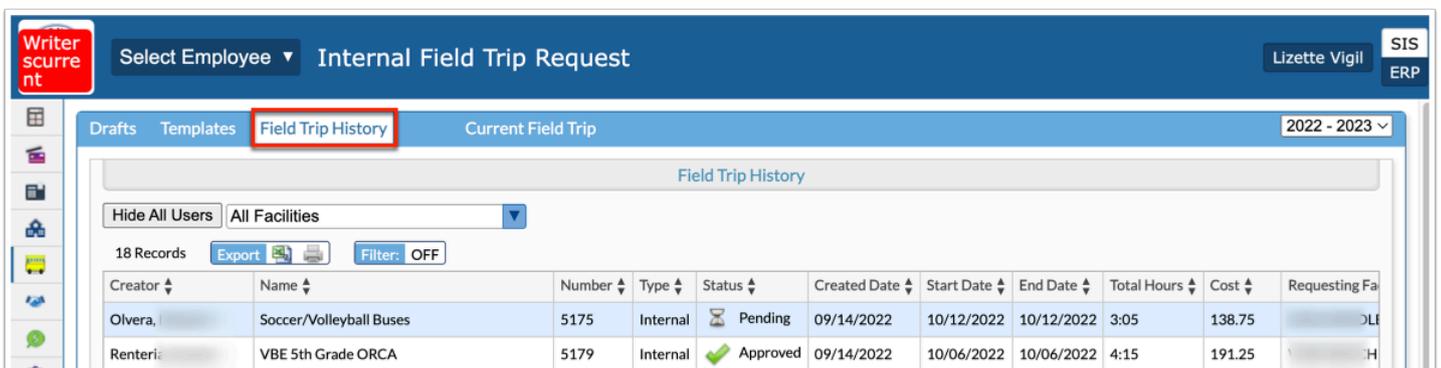
3. To view field trip history for a specific fiscal year, select the fiscal year from the pull-down. The pull-down defaults to the current fiscal year.

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.

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

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

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.

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	10/04/2202	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	✓	Appr	22	09/23/2022	5:30	1,237.50
5212	District	⧖	Pend	22	10/14/2022	7:00	630.00
5214	District	⧖	Pend	22	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

Tooltip overlay: **Approval Chain — Transportation —** ⧖ Lewis,

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

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 request.

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 **Internal Field Trip Request**.
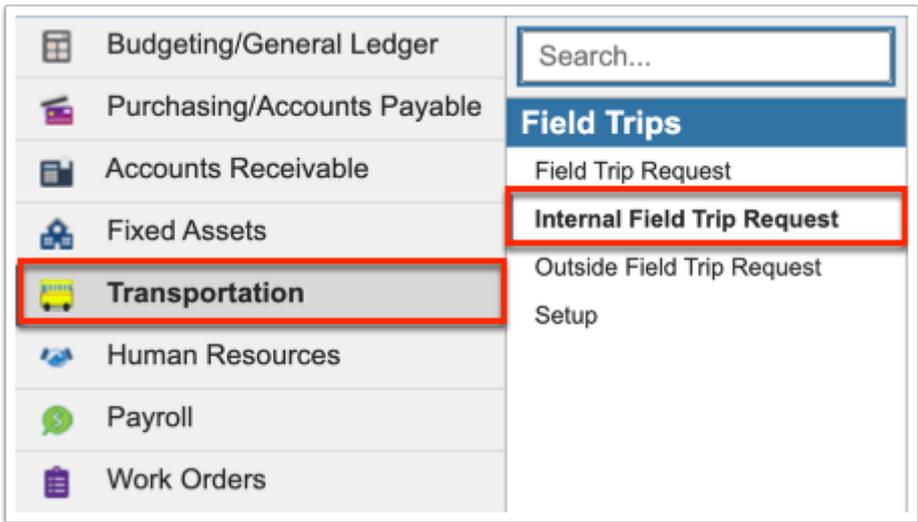
2. If you are a part of the Approval Chain for field trip requests, you will see a tab called **Pending Approval**. Click the tab to review all requests in order to be approved, denied, or sent back to originator.
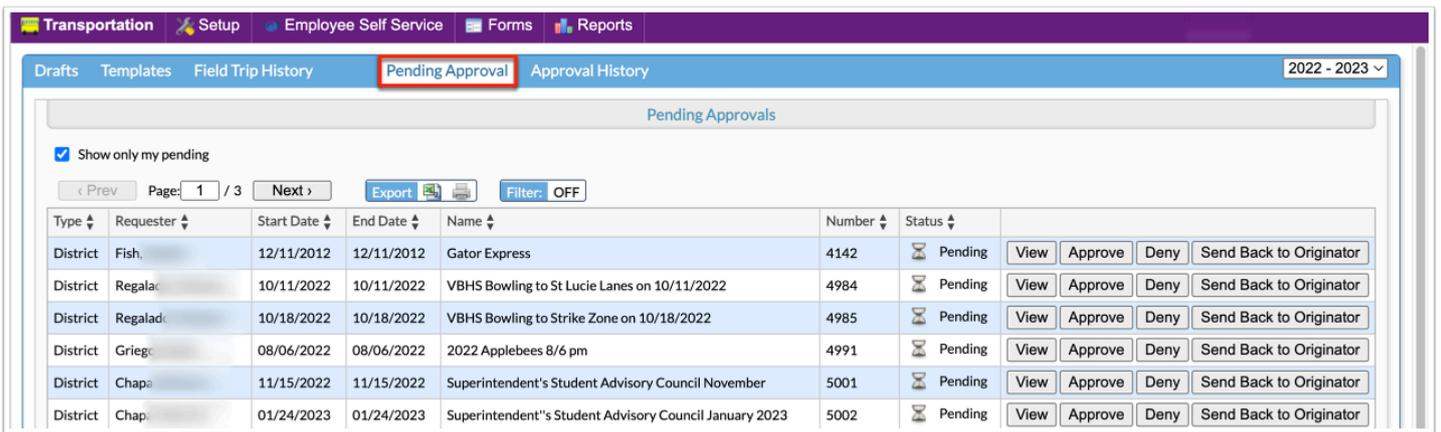
3. To view pending approvals for a specific fiscal year, select the year from the pull-down. The pull-down defaults to the current fiscal year.

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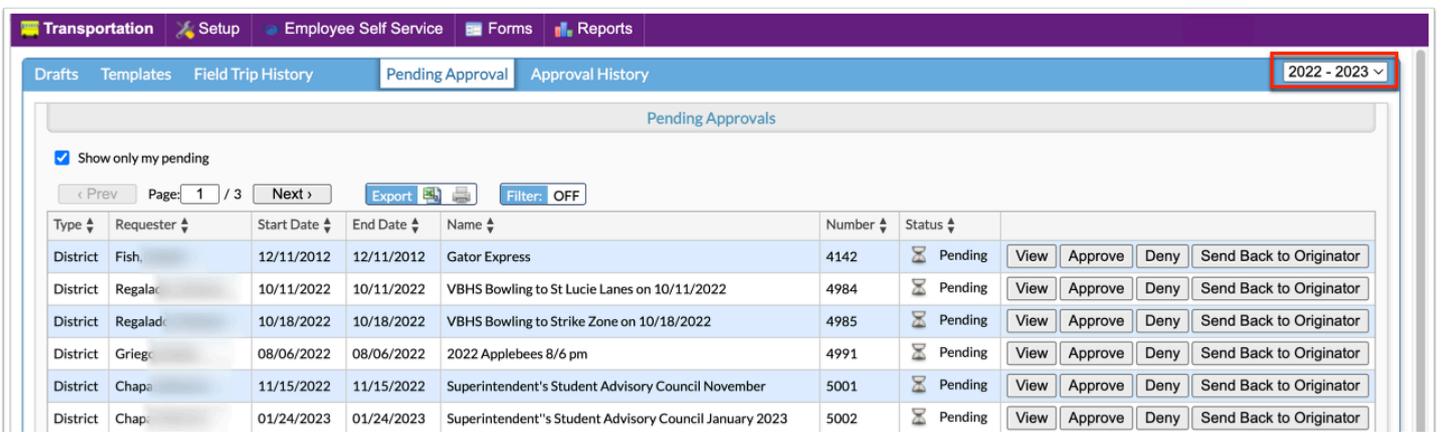
4. The **Show only my pending** check box is selected by default. To view requests pending approval by other users part of the approval chain, clear the selected check box.

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.

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.

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

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.

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](#).

7. On the Pending Approval tab, click the **Approve** button to approve the field trip request.

8. Click the **Deny** button, to deny the request.

9. 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**.

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

    a. To print, click the **printer** icon located in the upper right corner of the screen.

    b. To rotate the image, you can click the **circular arrow** (the 1st icon that appears in the upper right corner of the screen). Click the **down arrow** to download the image as a PDF file.

Approval History

> ℹ️ 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 **Internal Field Trip Request**.
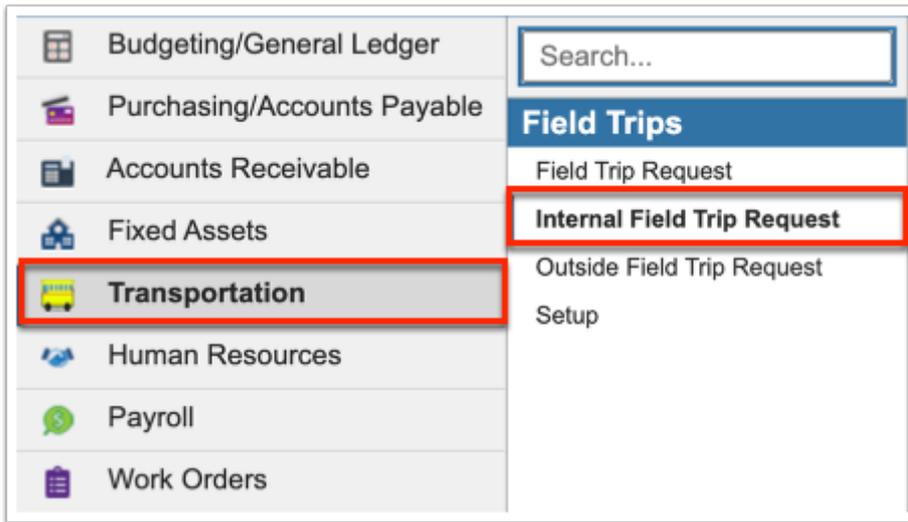
2. If you are a part of the Approval Chain for field trip requests, you will see a tab called **Approval History**. Click the tab to review all approved or denied requests.
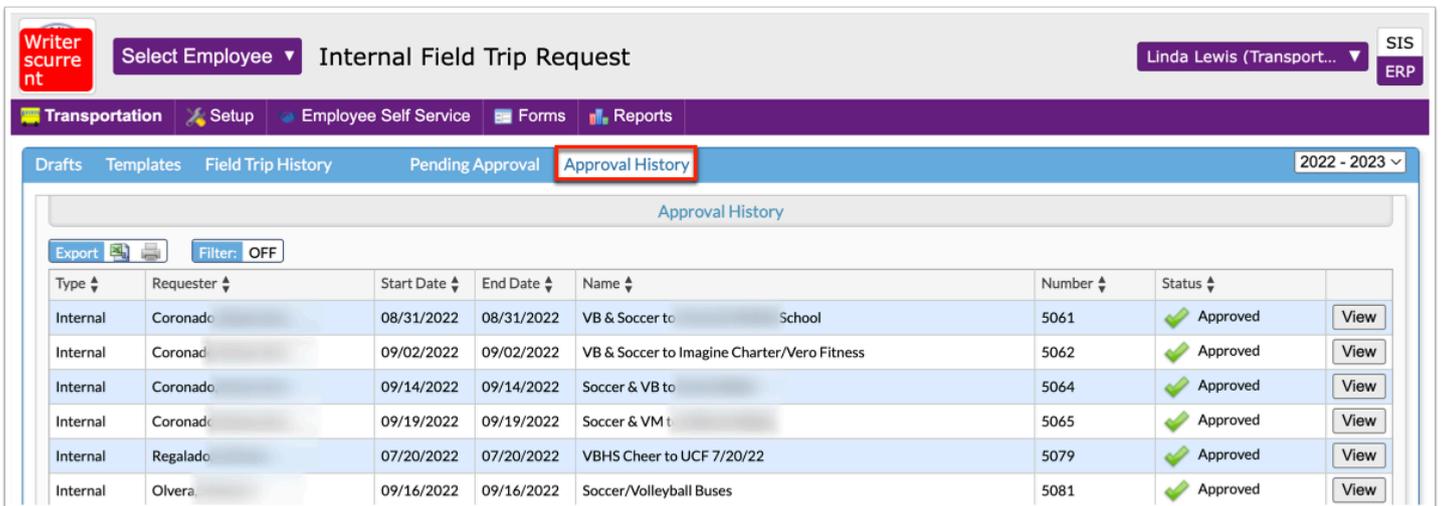
3. To view approval history for a specific fiscal year, select the year from the pull-down. The pull-down defaults to the current fiscal year.

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.

4. 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.

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

Field Trip Drivers

1. In the **Transportation** menu, click **Internal Field Trip Request**.
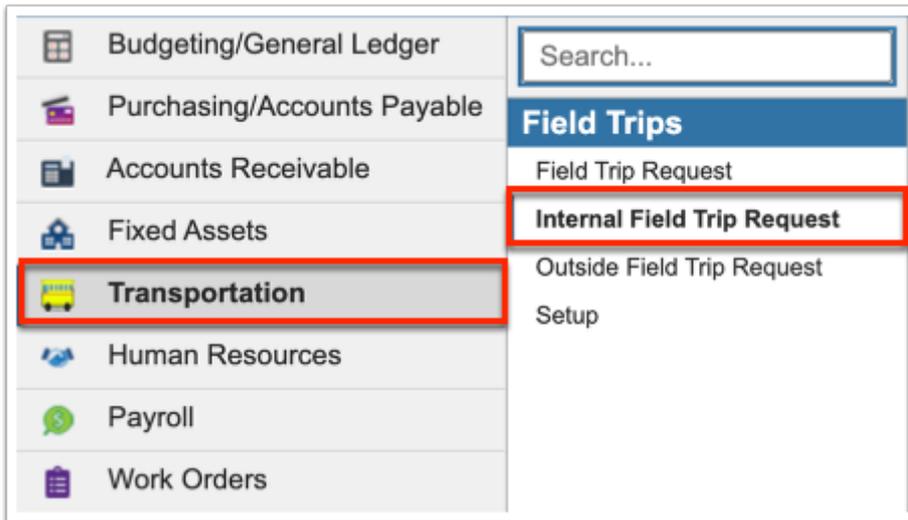
2. Click the **Field Trip History** tab.
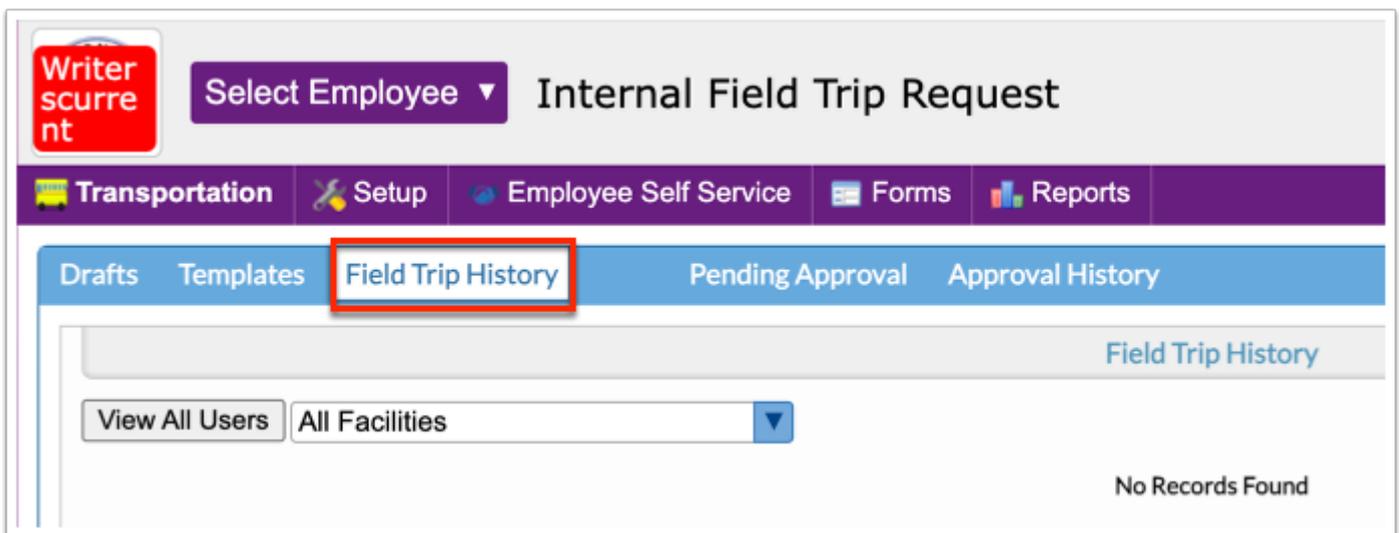
3. Once the field trip request has been approved by all users in the Approval Chain and a Driver Pool has been selected by one of the approvers, as described in step 6 of Pending Approval, click the **View** button next to the approved request.

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.

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.

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.

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.

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.

Internal Field Trip Request

Page 41
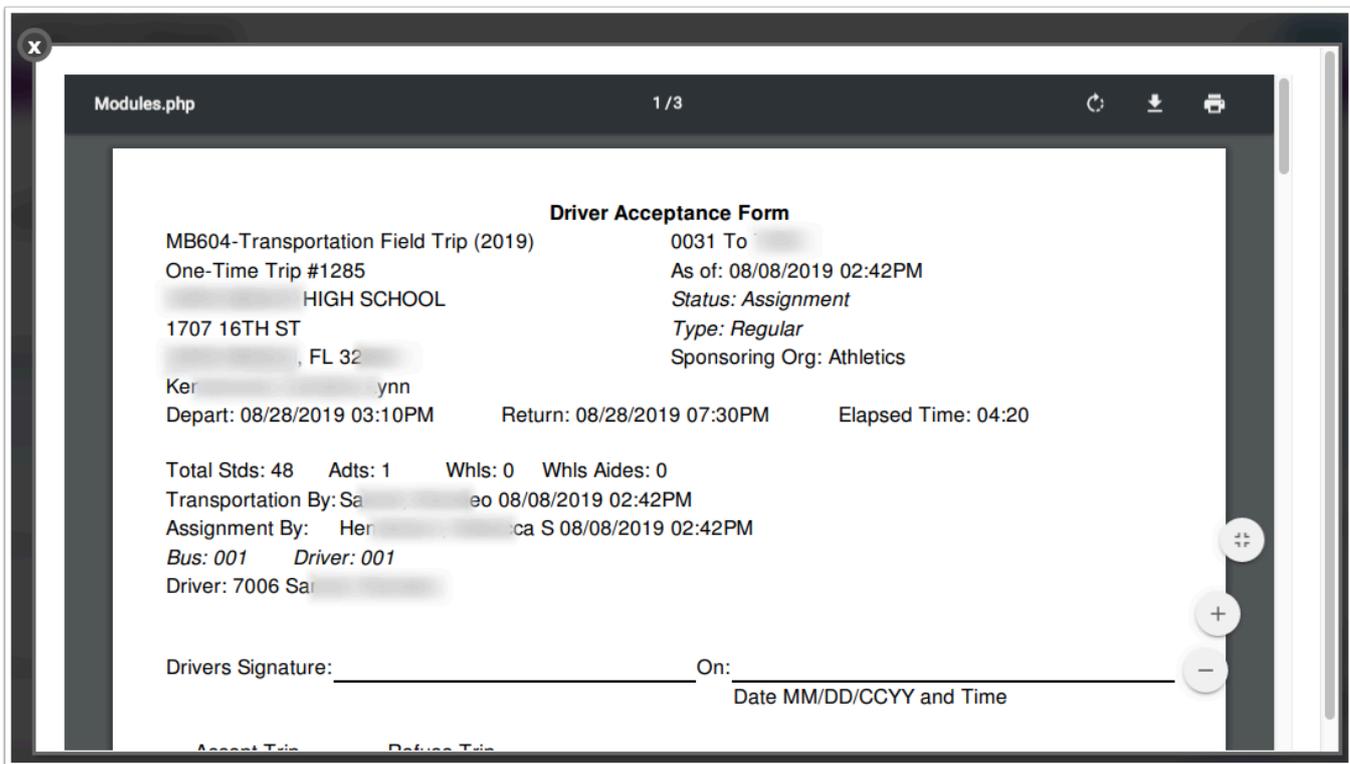
8. Based on the information completed on the Driver Acceptance Form, you can select from the following buttons: **Accept**, **Reject**, or **Delete**.

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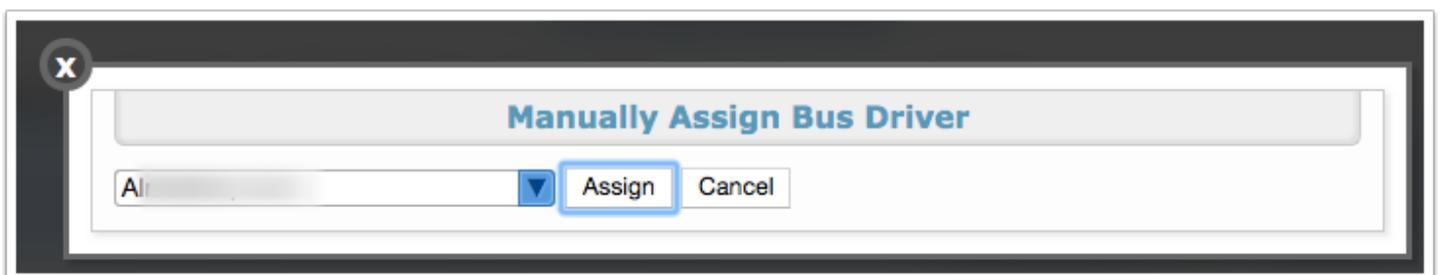
10. You can review **Field Trip Drivers** statuses in the upper right corner of the screen.

Complete Field Trip

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

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

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

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.

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

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
75	4	0	0	2	2

School Provided Drivers	# of Star Seats
0	0

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			
345	250.5	Print Unofficial Invoice	Complete Collection	Cancel Collection

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			
70	125	Print Unofficial Invoice	Complete Collection	Cancel Collection

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

> ℹ️ 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	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses
20	2	0	0	1

Drivers

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

Total Mileage	Final Cost	
100	165	Print Unofficial Invoice

Finalized Info for 7/11/2019

# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses
20	2	0	0	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	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	# of Star Seats
20	2		1	1	0

Drivers/Aides

No Records Found

Meals Per Day
7 Breakfast $66.5
☐ Lunch $0
☐ Dinner $0
Total Meal Cost: $66.5

Sunpass	Other Expenses
$ 12.00	$ 15.00

Total Mileage	Final Cost			
40	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.

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.

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

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

   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.

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

Billing						
oject ⬍	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

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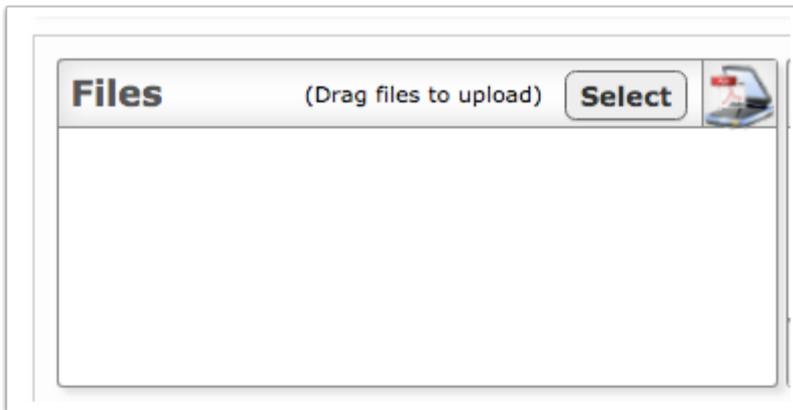
a. As indicated in the **Files** section, drag files directly into the box to attach documents or click the **Select** button to browse for files. Click the **Scan File** button for direct scanning; this will prompt you to download Dynamsoft. This is a one-time download that allows you to attach files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

16. 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.
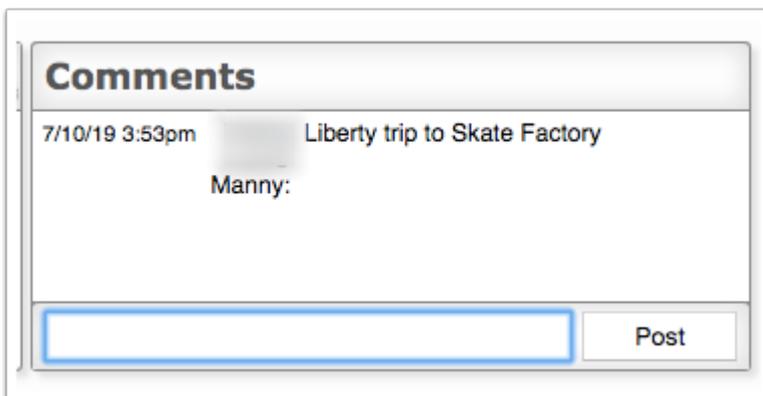
a. To post a comment, enter your comment in the text box and click **Post**.

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

a. To print, click the **printer** icon located in the upper right corner of the screen.

b. To rotate the image, you can click the **circular arrow** (the 1st icon that appears in the upper right corner of the screen). Click the **down arrow** to download the image as a PDF file.

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.

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.

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

    a. To add more than one filter to a column, click on the **green plus sign**.

    b. To delete an added filter, click on the **red minus sign**.

    c. Select the **gray arrow** for additional filtering rules.

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.

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.