

Outside Field Trip Request

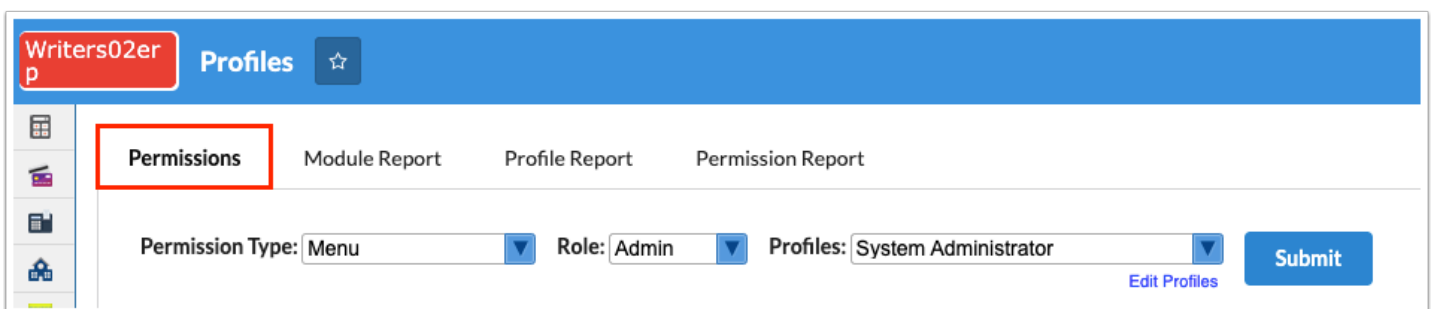
The Outside Field Trip Request module allows users to submit field trip requests, review their submitted requests and the status of the requests. Users part of the approval chain can review and approve requests as well as review Approval History. This module also allows users to assign drivers and complete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

Warehouse	Edit Fieldtrips	<input checked="" type="checkbox"/>
Applicants	Negative Budgets	<input type="checkbox"/>
Vendors	Allow Final Destination / Date Edit	<input checked="" type="checkbox"/>
Setup	Cancel Approved Field Trips	<input type="checkbox"/>
Development	Can Edit Approved Field Trips	<input type="checkbox"/>
Import Tools	Outside Field Trip Request	<input checked="" type="checkbox"/>
Employee Self Service	Close Fieldtrips	<input checked="" type="checkbox"/>
Forms	Reopen Fieldtrips	<input checked="" type="checkbox"/>
Reports	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"/>
	Setup	<input checked="" type="checkbox"/>

Outside 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 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**.

The screenshot shows the 'Permissions' tab in a software interface. At the top, there are tabs for 'Permissions', 'Module Report', 'Profile Report', and 'Permission Report'. Below these, there are dropdown menus for 'Permission Type' (set to 'Menu'), 'Role' (set to 'Admin'), and 'Profiles' (set to 'System Administrator'). A 'Submit' button is next to these. A red box highlights a 'Save' button in the top right corner. On the left, there is a 'Find' search bar and a list of modules: Portal, Budgeting/General Ledger, Purchasing/Accounts Payable, Accounts Receivable, Fixed Assets, and Transportation (which is highlighted). The main area displays a table for 'Field Trips' with a 'View' column. The table lists various permissions, all of which are checked.

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 an Outside Field Trip Request Draft

1. From the **Transportation** menu, click **Outside Field Trip Request**.

The screenshot shows a sidebar menu with two main sections: 'Trans...' (Transportation) and 'Huma...' (Human Resources). The 'Trans...' section is highlighted with a red box. Below it is a search bar. Under the search bar, there is a 'Field Trips' section. Within this section, the 'Outside Field Trip Request' option is highlighted with a red box. Other options in the 'Field Trips' section include 'Field Trip Request', 'Internal Field Trip Request', and 'Setup'.

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.

Writers02 Outside Field Trip Request ☆ Lizette Garcia SIS ERP

Drafts Templates Field Trip History Current Field Trip 2020 - 2021

Create a Field Trip Request

Existing Drafts

View All Users

Export Filter: OFF

Name	Type	Created Date	Duplicate	View
Soccer Drop Only	Outside	11/30/2020	Duplicate	View
Basketball Drop	Outside	11/30/2020	Duplicate	View

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

Drafts Templates Field Trip History

Create a Field Trip Request

Field Trip to Zoo Create

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.

Drafts Templates Field Trip History Current Field Trip 2019 - 2020

Field Trip to Zoo

Number 1277 Field Trip Status Unsubmitted Creator Garcia, Lizette Created Date 08/05/2019 Requesting Facility Sponsoring Organization Date Start

Recurring

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

Requested By Pick Up Contact Final Destination 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

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. For example, if the field trip is to take place every Wednesday in September, you would enter 09/04/2019 - 09/25/2019.

Zoo

Number 1	Field Trip Status Unsubmitted	Creator Lestrangle, Beatrix	Created Date 09/24/2019	Requesting Facility 0041 ... ▼	Sponsoring Organization ▼
Date Range 10/08/2019 - 10/30/2019			Recurring <input checked="" type="checkbox"/>		
# of Students 20	# of Adults 	# of Wheelchairs 	# of Bus Aides 	# of Buses 1	# of Star Seats 0
Requested By @focusschools.org		Pick Up Contact 	Final Destination ▼ +	Are To Go Lunches Required? <input type="checkbox"/>	

💡 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.

# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses
50	8	1		2
Requested By		Pick Up Contact		Final Destination
@schools.org				TB ZOO ▼ +
				Are To Go Lunches Required?
				<input type="checkbox"/>

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

Add Field Trip Facility

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

16. Enter the **Estimated Trip Miles** in the provided text box.

School Provided Drivers		# of Star Seats	
1		0	
Requested By		Pick Up Contact	
@focusschools.org			
Final Destination		Estimated Trip Miles	
▼ +		30	
Are To Go Lunches Required?			
<input type="checkbox"/>			

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.

FOCUS Field Trip Request SIS ERP Lizette Garcia

Budge... Purch... Accou... Fixed ... Trans... Huma... Payroll Work ... Wareh... Set... Devel... Emplo... Forms

Field Trip to Zoo

Number 1277 Field Trip Status Unsubmitted Creator Garcia, Lizette Created Date 08/05/2019 Requesting Facility 0041 Sponsoring Organization Educational - 5100

Date Range 09/04/2019 - 09/25/2019 Recurring ☒

of Students 50 # of Adults 8 # of Wheelchairs 1 # of Bus Aides # of Buses 2

Requested By @ hools.org Pick Up Contact Final Destination TB ZOO Are To Go Lunches Required? ☒

Cafeteria Manager Notified ☐ Number of Lunches 60

Pick-Ups/Drop-Offs **Generate**

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 Start Date 09/04/2019 End Date 09/25/2019

Recurs Every Week Recurring Days

Locations

School Location: Code: Description: # Students: # Adults: # Wheelchairs: # Bus Aides: Add Additional Location Delete Additional Location

Destination

Location: Code: Description: Are To Go Lunches Required? ☐ Number Of Lunches Cafeteria Manager Notified? ☐

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

Generate Locations

Date Range
Field Trip Date: 08/05/2019

School
Location: Code:
Description:
Students: # Adults: # Wheelchairs: # Bus Aides:

Destination
Location: Code:
Description:

Are To Go Lunches Required? ☐ Number Of Lunches:
Cafeteria Manager Notified? ☐

☐ Overnight Trip
☐ No Return Trip

Times
Departure:

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. 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: Code:

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. 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

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

b. 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	# S	
	09/19/2019	09:00 am	0041 RO...	Loop	09/19/2019	09:45 am	BRE...	Parking Lot B	25	
	09/19/2019	02:00 pm	TBRZ BR...	Parking Lot B	09/19/2019	02:45 pm	0041 ROS...	Loop	0	
Total Time: 5:45		Est Cost: \$345.00								

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	# S	
	09/19/2019	09:00 am	0041 RO...	Loop	09/19/2019	09:45 am	TBRZ BRE...	Parking Lot B	25	
	09/19/2019	02:00 pm	TBRZ BR...	Parking Lot B	09/19/2019	02:45 pm	0041 ROS...	Loop	0	
	09/19/2019									
Total Time: 5:45		Date (mm/dd/yyyy)								

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
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.

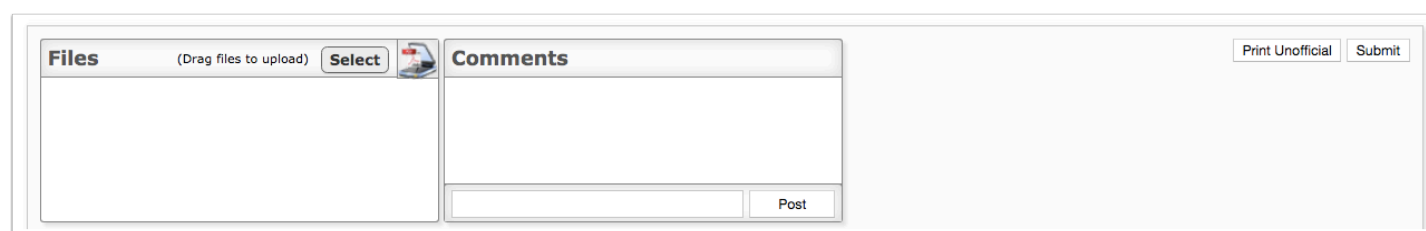
3. When the accounting strip has been selected and the Amount has been entered, while clicked into a text box, press the **Enter** key to commit the line of data. The line will turn blue and the delete button will display when the line has saved.

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. There is also a Scan File button next to the Select button for direct scanning. Click the **Scan File** button; 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 a web form for finalizing a field trip request. It is divided into two main sections: 'Files' and 'Comments'. The 'Files' section on the left has a header with the text '(Drag files to upload)' and a 'Select' button. Below this is a large white rectangular area for file uploads. The 'Comments' section on the right has a header with the text 'Comments' and a 'Post' button at the bottom. To the right of the 'Comments' section, there are two buttons: 'Print Unofficial' and 'Submit'. The entire form is enclosed in a light gray border.

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.

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

Modules.php 1 / 1

FOCUS **Lizette** 2019-08-07

Field Trip Request

Number	Creator	Created Date	Date Range	Recurring
1292	32153	2019-08-07	2019-09-19 – 2019-09-19	No

Field Trip Status	# of Students	# of Adults	# of Wheelchairs	# of Buses
U	25	0	0	1

Locations

Pick Up				Drop Off			
Date	Time	Facility	Location	Date	Time	Facility	Location
2019-09-19	09:00 am	0041 ELEMENTARY	Loop	2019-09-19	09:45 am	ZOO	Parking Lot B
2019-09-19	02:00 pm	ZOO	Parking Lot B	2019-09-19	02:45 pm	0041 ELEMENTARY	Loop

i. To print, click the **printer** icon located in the upper right corner of the screen. Note: If you do not see the black bar across the top of the screen or any of the icons, move your pointer over the window to make it appear. 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. You can also expand the window, zoom in, and zoom out using the three icons on the right side of the screen.

Viewing Existing Field Trip Drafts

1. From the **Transportation** menu, click **Outside Field Trip Request**.

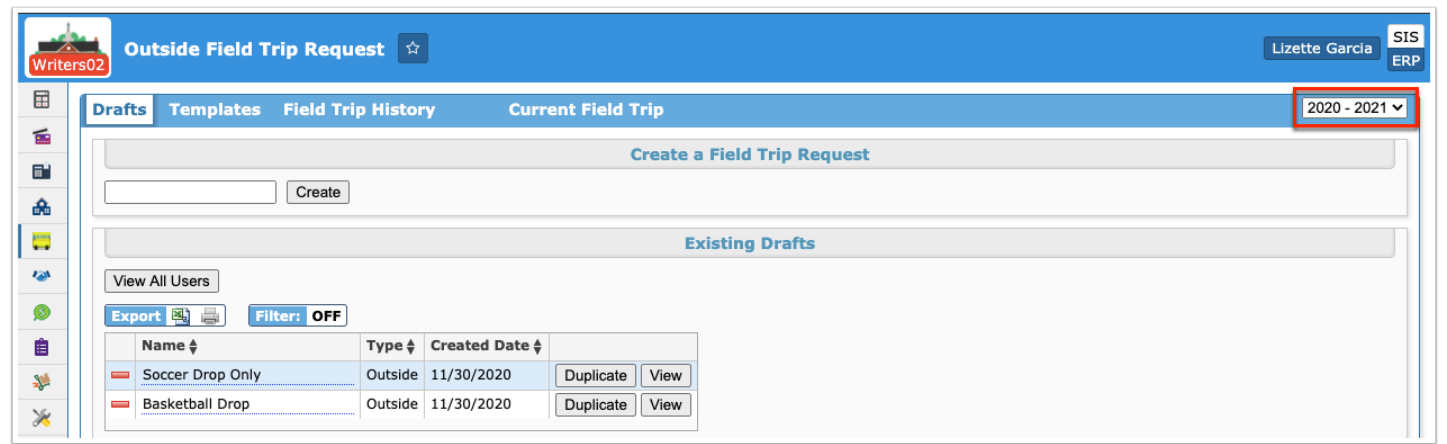
Trans... **Huma...**

Search...

Field Trips

- Field Trip Request
- Internal Field Trip Request
- Outside Field Trip Request**
- Setup

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.



Outside Field Trip Request

Lizette Garcia SIS ERP

Drafts Templates Field Trip History Current Field Trip

2020 - 2021

Create a Field Trip Request

Create

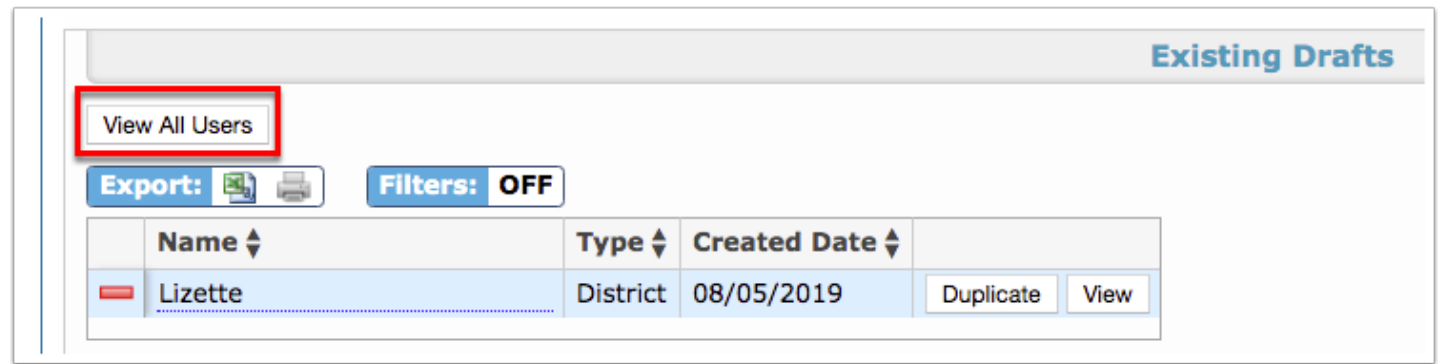
Existing Drafts

View All Users

Export Filter: OFF

Name	Type	Created Date		
Soccer Drop Only	Outside	11/30/2020	Duplicate	View
Basketball Drop	Outside	11/30/2020	Duplicate	View

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.



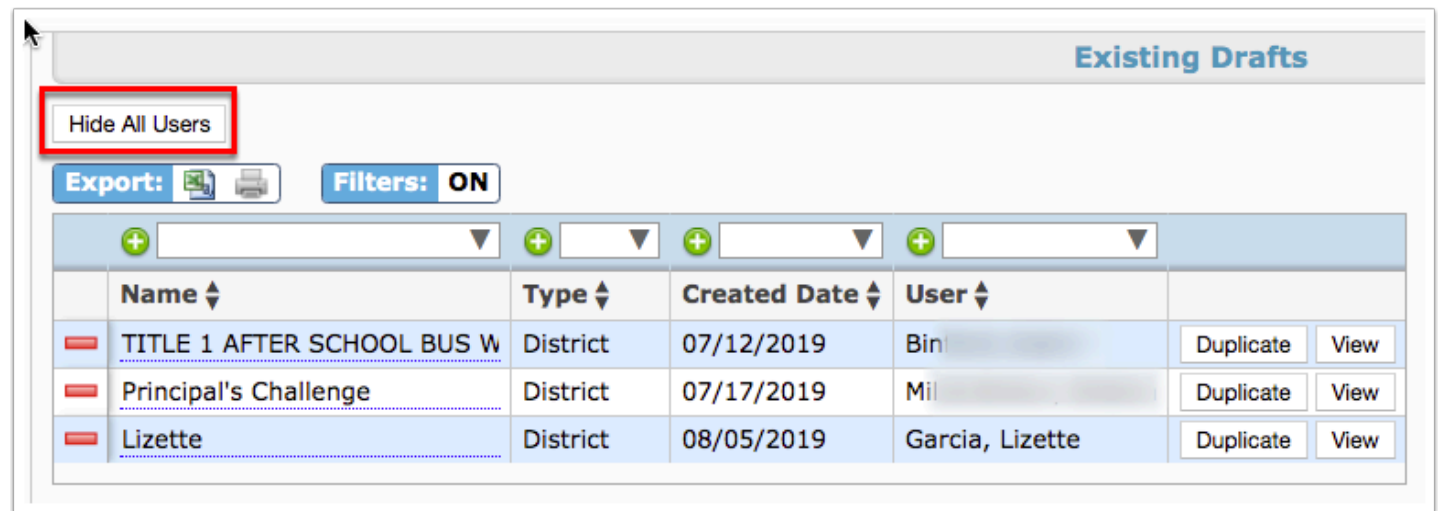
Existing Drafts

View All Users

Export Filters: OFF

Name	Type	Created Date		
Lizette	District	08/05/2019	Duplicate	View

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



Existing Drafts

Hide All Users

Export Filters: ON

Name	Type	Created Date	User		
TITLE 1 AFTER SCHOOL BUS W	District	07/12/2019	Bin	Duplicate	View
Principal's Challenge	District	07/17/2019	Mil	Duplicate	View
Lizette	District	08/05/2019	Garcia, Lizette	Duplicate	View

4. 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

Export:

Filters: OFF

	Name	Type	Created Date	User	
	TITLE 1 AFTER SCHOOL BUS W	District	07/12/2019	Bir	<div>Duplicate</div> <div>View</div>
	Principal's Challenge	District	07/17/2019	Mil	<div>Duplicate</div> <div>View</div>
	Lize	District	08/05/2019	Garcia, Lizette	<div>Duplicate</div> <div>View</div>

5. 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 Outside Field Trip Request Draft](#). Click the **Drafts** tab to return to the drafts.

Outside Field Trip Request

SIS ERP Lizette Garcia

Budget...

Purchas...

Account...

Fixed A...

Transp...

Human ...

Payroll

Work Or...

Wareho...

Set...

Develop...

Employ...

Form

Drafts

Templates

Field Trip History

Current Field Trip

2019 - 2020

Soccer Drop Only

Number

Field Trip Status

Creator

Created Date

Requesting Facility

Sponsoring Organization

Date

Recurring

1310

Unsubmitted

Hender

08/14/2019

5005

Charter

10/01/2019

☐

of Students

of Adults

of Wheelchairs

of Bus Aides

of Buses

30

1

0

0

1

Requested By

Pick Up Contact

Final Destination

Are To Go Lunches Required?

@ schools.org

Bill 88-8838

0371

☐

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
	Drop Only	10/01/2019	03:15 pm	5005 SE...	Bus Loop	10/01/2019	03:30 pm	0371 STO...	Bus Loop	30	1
		10/01/2019	03:15 pm	0371 ST...	Bus Loop	10/01/2019	03:30 pm	5005 SEB...	Bus Loop	0	0

6. 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.

A modal dialog box with a dark border and a close button (X) in the top-left corner. The text inside says "Please enter a name of the new field trip". Below this text is a text input field containing the text "Trip 2". At the bottom right of the dialog are two buttons: "Cancel" and "OK".

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

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

The screenshot shows a web interface titled "Existing Drafts". At the top, there is a "Hide All Users" button. Below it are "Export:" buttons (with icons for CSV and PDF) and a "Filters: ON" button. The main part of the interface is a table with columns: Name, Type, Created Date, and User. Each row has a red minus sign icon in the first column, which is highlighted with a red box in the image. To the right of each row are "Duplicate" and "View" buttons.

	Name	Type	Created Date	User		
-	TITLE 1 AFTER SCHOOL BUS W	District	07/12/2019	Bin	Duplicate	View
-	Principal's Challenge	District	07/17/2019	Mil	Duplicate	View
-	Lize	District	08/05/2019	Garcia, Lizette	Duplicate	View
-	Trip 2	District	08/05/2019	Garcia, Lizette	Duplicate	View

Templates

1. From the **Transportation** menu, click **Outside Field Trip Request**.

Trans... Huma...

Search...

Field Trips

Field Trip Request

Internal Field Trip Request

Outside Field Trip Request

Setup

2. Click the **Templates** tab to create a template that can be used to create field trip requests as many times as needed.

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

Create a Field Trip Request

Create

Existing Templates

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

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

Create a Field Trip Request

Elementary Park Trip Create

Existing Templates

4. 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.

Drafts **Templates** **Field Trip History** **Current Field Trip** 2019 - 2020

Elementary Park Trip

Number 1296	Field Trip Status Template	Field Trip Type	Creator Garcia, Lizette	Created Date 08/12/2019	Requesting Facility
Sponsoring Organization			Date -	Recurring No	
# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	
Requested By @ schools.org					
Pick Up Contact		Final Destination		To Go Lunches Required No	

5. 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](#).

6. **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.

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

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

Create a Field Trip Request

Existing Templates

Export: **Filters:** **OFF**

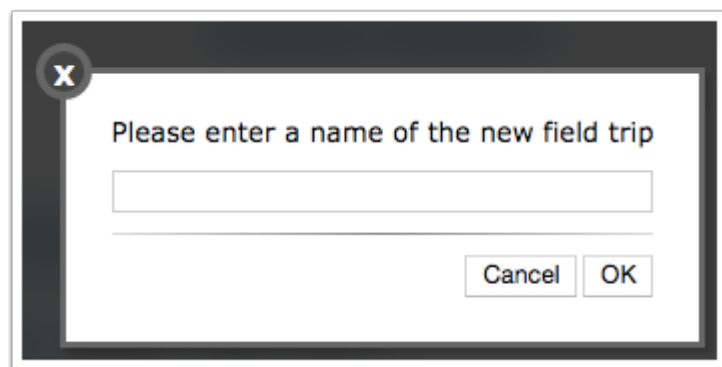
Name	Type	User			
Elementary Park Trip	District	Garcia, Lizette	<input type="button" value="Duplicate"/>	<input type="button" value="View"/>	<input type="button" value="Use"/>

8. Once the template has been created, you can click the text underlined in blue to edit the **Name**. To create a copy of the template and edit it as needed for other uses, click the **Duplicate** button.

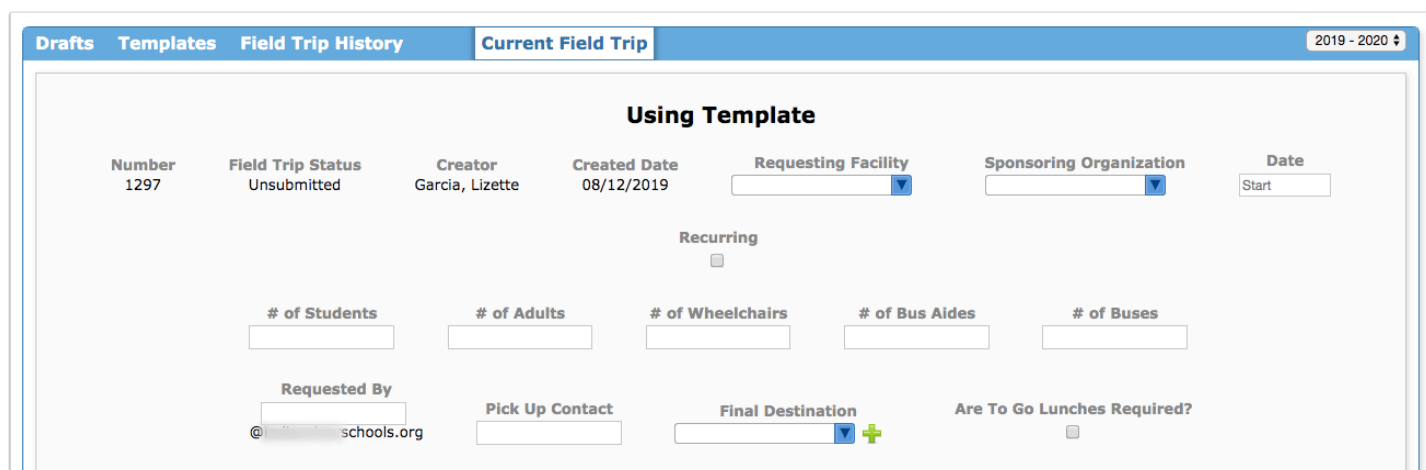
To remove any existing templates, click the **delete** button.

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

10. 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. 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 an Outside Field Trip Request Draft](#).



Field Trip History

1. Click the **Field Trip History** tab to view the status of your request as well as other details pertaining to submitted requests.

Drafts Templates Field Trip History Current Field Trip 2019 - 2020										
Field Trip History										
Hide All Users										
Prev Page: 1 / 3 Next Export: Filters: OFF										
Creator	Name	Number	Type	Status	Created Date	Start Date	End Date	# of Students	# of Adults	# of V
Brace	5th Grade Museum trip	1503	Outside	Pending	09/23/2019	10/22/2019	10/22/2019	89	6	
Brace	Moonshot afterschool program	1499	Outside	Pending	09/19/2019	10/15/2019	12/12/2019	50	0	0
Job	PIE-VB Museum of Art	1482	Outside	Pending	09/18/2019	11/08/2019	11/08/2019	50	4	0
Negreira	5th grade VBMA 11.15.19 (1)	1460	Outside	Pending	09/16/2019	11/15/2019	11/15/2019	55	4	0
Negre	5th grade VBMA 11.15.19 (2)	1461	Outside	Pending	09/16/2019	11/15/2019	11/15/2019	55	4	0
Pond	DEGRAEVE 1ST GR - SPECIAL EQUESTRIAN	1456	Outside	Approved	09/13/2019	09/24/2019	10/08/2019	20	6	0
Dun	Moonshot Academy 19-20	1437	Outside	Approved	09/12/2019	09/24/2019	10/03/2019	18	0	0

2. 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](#).

Drafts Templates Field Trip History Current Field Trip										
Field Trip History										
View All Users										



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

Drafts Templates Field Trip History Current Field Trip										
Field Trip History										
Hide All Users										
Prev Page: 1 / 10 Next Export: Filters: OFF										
Creator	Name	Number	Type	Status	Created Date					
Ken	SWIMMING	1285	District	Pending	08/06/2019					
Ken	SWIMMING	1286	District	Pending	08/06/2019					

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, the # of Students, # of Adults, # of Wheelchairs, and the # of Bus Aides attending the field trip, and whether or not the field trip has been Completed.

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.

Prev	Page: 1 / 3	Next	Export:  	Filters: OFF		
Creator	Name	Number	Type	Status	Created Date	Start Date
Brace	5th Grade Museum trip	1503	Outside	Pending	09/23/2019	10/22/2019
Brace	Moonshot afterschool program	1499	Outside	Pending	09/23/2019	10/15/2019
Job	PIE-VB Museum of Art	1482	Outside	Pending	09/23/2019	11/08/2019
Negre	5th grade VBMA 11.15.19 (1)	1460	Outside	Pending	09/23/2019	11/15/2019
Negr	5th grade VBMA 11.15.19 (2)	1461	Outside	Pending	09/16/2019	11/15/2019
Ponde	DEGRAEVE 1ST GR - SPECIAL EQUESTRIAN	1456	Outside	Approved	09/13/2019	09/24/2019

Approval Chain
— Transportation —



Brya

4. 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
2019 - 2020

Field Trip History

Hide All Users

Prev
Page: 1 / 10
Next
Export:  
Filters: OFF

Created Date	Start Date	End Date	# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	
08/06/2019	08/28/2019	08/28/2019	48	1	0	0	2	No	View Duplicate Cancel
08/06/2019	09/11/2019	09/11/2019	48	1	0	0	2	No	View Duplicate Cancel
08/06/2019	09/18/2019	09/18/2019	48	1	0	0	2	No	View Duplicate Cancel
08/06/2019	09/25/2019	09/25/2019	48	1	0	0	2	No	View Duplicate Cancel

Drafts
Templates
Field Trip History
Current Field Trip
Complete Field Trip
2019 - 2020

PICK UP FOOTBALL PLAYERS

Number
1092

Field Trip Status
Approved

Field Trip Type
N/S

Creator
Bar

Created Date
07/02/2019


Requesting Facility
0031 HIGH SCHOOL


Sponsoring Organization
Athletics


Date
07/23/2019 - 07/23/2019


Recurring
No

Field Trip Drivers

Smith  Rejected

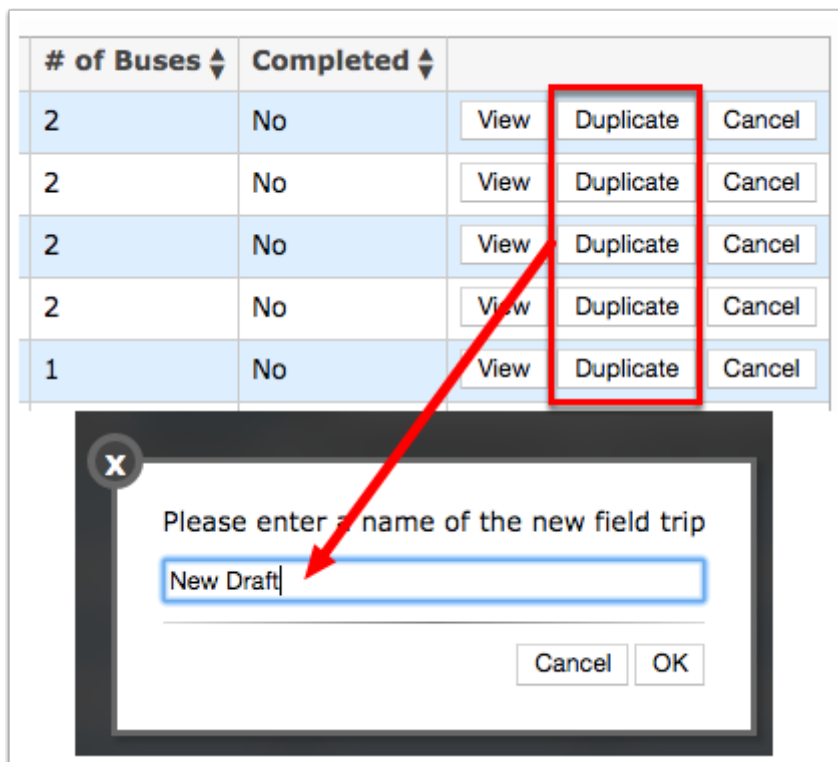
Sullivan  Rejected

Biggs  Accepted

Arguello  Accepted

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](#).

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

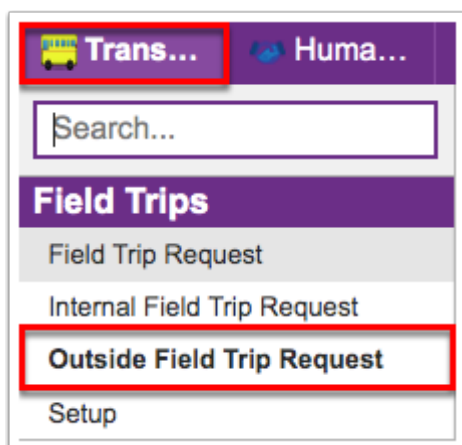


a. Upon creating a copy, you will be prompted to enter a name of the new field trip. Click **OK** once the name has been entered. You can also click **Cancel** to close the pop-up window and return to the Filed Trip History tab.

6. Click **Cancel** to cancel the field trip request.

Pending Approval

1. From the **Transportation** menu, click **Outside 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.

Transportation Setup Employee Self Service

Drafts Templates Field Trip History **Pending Approval** Approval History Current Field Trip

Pending Approvals

☒ Show only my pending

Prev Page: 1 / 8 Next Export: Filters: OFF

3. 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									
<input checked="" type="checkbox"/> Show only my pending									
Prev Page: 1 / 8 Next Export: Filters: OFF									
Type	Requester	Start Date	End Date	Name	Number	Status			
District	Be	01/22/2019	01/22/2019	HS 1/22	61	Pending	View	Approve	Deny
District	Be	02/09/2019	02/09/2019	2/9 WR	81	Pending	View	Approve	Deny
District	Be	02/19/2019	02/19/2019	2/19 SB	89	Pending	View	Approve	Deny
District	Be	02/28/2019	02/28/2019	2/28 BA	96	Pending	View	Approve	Deny
District	Be	03/07/2019	03/07/2019	3/7 SO	99	Pending	View	Approve	Deny
District	Be	03/08/2019	03/08/2019	3/8 BA	101	Pending	View	Approve	Deny

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.

Export: Filters: OFF									
	End Date	Name	Number	Status					
9	01/22/2019	HS 1/22	61		<div>Approval Chain</div> <div>— Transportation —</div> <div>Her</div>				
9	02/09/2019	2/9 WR	81						
9	02/19/2019	2/19 SB	89						
9	02/28/2019	2/28 BA	96	Pending					

5. 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 Current Field Trip 2019 - 2020

HS 1/22

Number 61	Field Trip Status Pending	Field Trip Type N/S	Creator Be...	Created Date 01/07/2019	0291	Requesting Facility HIGH SCHOOL
Sponsoring Organization Athletics		Date 01/22/2019	Recurring No			
# of Students 20	# of Adults 4	# of Wheelchairs 0	# of Bus Aides 0	# of Buses 1		
Requested By chris...@schools.org		Pick Up Contact 7... 4186	Final Destination TS... WE... +		To Go Lunches Required No	

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. For more information on each of these options, see step 7.

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

Post

Approve Deny Send Back to Originator

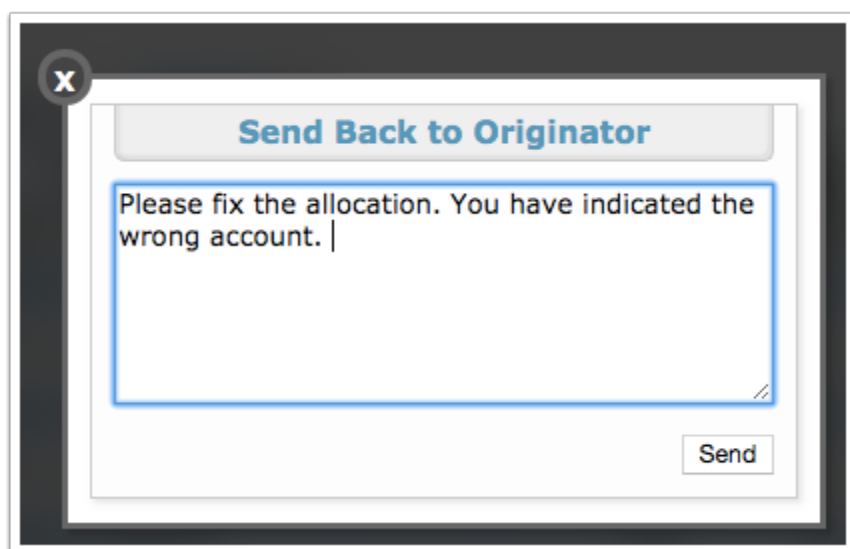
Print Unofficial

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.



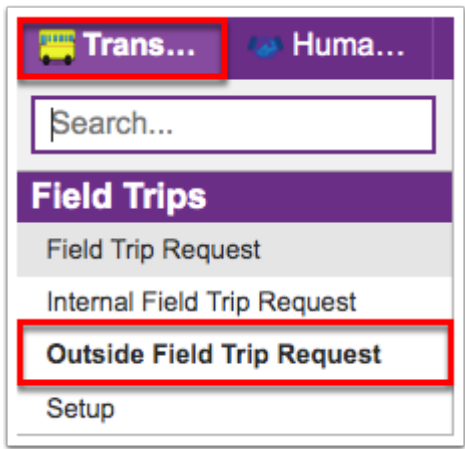
9. From this screen, you can also **Print Unofficial** documentation by clicking the corresponding button.

Pick Up		Drop Off	
Date	Time	Date	Time
2019-09-19	09:00 am	2019-09-19	09:45 am
0041 ELEMENTARY	Loop	ZOO	Parking Lot B
2019-09-19	02:00 pm	2019-09-19	02:45 pm
ZOO	Parking Lot B	0041 ELEMENTARY	Loop

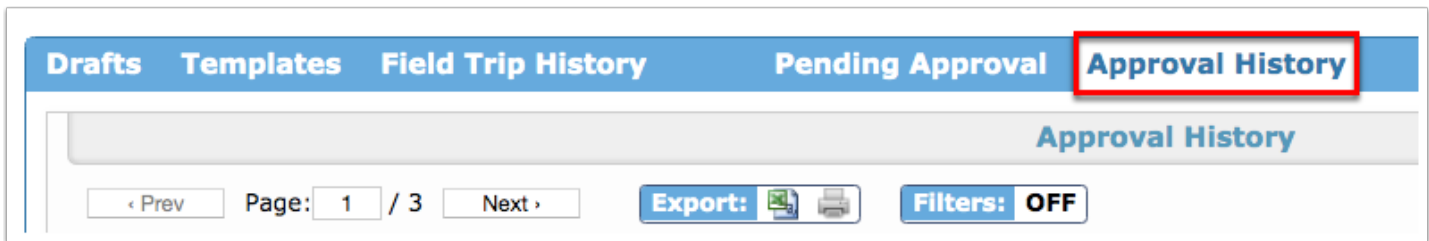
a. To print, click the **printer** icon located in the upper right corner of the screen. Note: If you do not see the black bar across the top of the screen or any of the icons, move your pointer over the window to make it appear. To rotate the image, you can click the **circular arrow** (the 1st icon that appears in the upper right corner of the screen). Click the **down arrow** to download the image as a PDF file. You can also expand the window, zoom in, and zoom out using the three icons on the right side of the screen.

Approval History

1. From the **Transportation** menu, click **Outside 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.





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							
<div>« Prev Page: 1 / 3 Next » Export: Filters: OFF</div>							
Type	Requester	Start Date	End Date	Name	Number	Status	
District	Ma	08/01/2019	08/01/2019	summer camp swimming	1115	❌ Denied	View
District	Be	07/21/2019	07/21/2019	FOOTBALL TO	1091	✅ Approved	View
District	Be	07/23/2019	07/23/2019	PICK UP FOOTBALL PLAYERS	1092	✅ Approved	View
District	Ad	07/01/2019	07/12/2019	Step into PM 7/1-7/12	1093	✅ Approved	View
District	Ad	07/01/2019	07/12/2019	Step into AM 7/1-7/12	1094	✅ Approved	View
District	Ad	07/01/2019	07/12/2019	Step into PM 7/1-7/12	1095	✅ 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					
Export:  		Filters: OFF			
Start Date	End Date	Name	Number	Status	
08/01/2019	08/01/2019	summer camp swimming	1115	✗ Denied	View
07/21/2019	07/21/2019	FOOTBALL TO			View
07/23/2019	07/23/2019	PICK UP FOOTBALL PLAYERS			View
07/01/2019	07/12/2019	Step into PM 7/1-7/12			View
07/01/2019	07/12/2019	Step into AM 7/1-7/12	1094	✓ Approved	View
07/01/2019	07/12/2019	Step into PM 7/1-7/12	1095	✓ Approved	View

Approval Chain
Transportation
 ✓ Br - 07/11/2019 10:01am

4. 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
Current Field Trip
Complete Field Trip
2019 - 2020

FOOTBALL TO

Number
1091

Field Trip Status
Approved

Field Trip Type
N/S

Creator
Bar

Created Date
07/02/2019

Requesting Facility
0031 HIGH SCHOOL

Sponsoring Organization
Athletics

Date
07/21/2019

Recurring
No

Field Trip Drivers

Hal ✓ Accepted



Alic ✓ Accepted

Patr Deleted

Joh Deleted

Field Trip Drivers

1. From the **Transportation** menu, click **Outside Field Trip Request**.

 Trans...
 Huma...

Search...

Field Trips

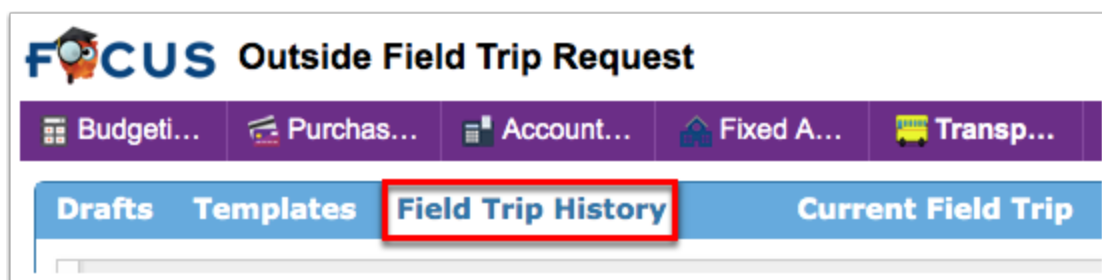
Field Trip Request

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 step 6 of [Pending Approval](#), click the **View** button next to the approved request.

The screenshot shows the 'Field Trip History' table. The table has columns for Status, Created Date, Start Date, End Date, # of Students, # of Adults, # of Wheelchairs, # of Bus Aides, # of Buses, and Completed. The first row is 'Approved' and has a 'View' button highlighted with a red box. The table also includes a 'Hide All Users' button, a 'Page: 1 / 10' indicator, and an 'Export' button.

Status	Created Date	Start Date	End Date	# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	View
Approved	08/06/2019	08/28/2019	08/28/2019	48	1	0	0	2	No	View
Pending	08/06/2019			48	1	0	0	2	No	View
Pending	08/06/2019	09/18/2019	09/18/2019	48	1	0	0	2	No	View
Pending	08/06/2019	09/25/2019	09/25/2019	48	1	0	0	2	No	View
Pending	08/06/2019	09/19/2019	09/19/2019	35	2	0	0	1	No	View

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.

The screenshot shows the 'Pick-Ups/Drop-Offs' section. It includes a table with columns for Drop-Off Location, # Students, # Adults, # WheelChairs, # Bus Aides, Type, and Drivers. The 'Drivers' column shows assigned drivers and their status (Pending, Accepted, Rejected, Deleted). The table also includes a 'Generate' button and a 'Queue Pull' button.

Drop-Off Location	# Students	# Adults	# WheelChairs	# Bus Aides	Type	Drivers
	48	1	0	0	Departure	Ram: Pending, Accept, Reject, Delete, Print Bon: Pending, Accept, Reject, Delete, Print
WITT GYM	0	0	0	0	Return	Mades: Deleted, Revert, Print Earl: Pending, Accept, Reject, Delete, Print Bra: Deleted, Revert, Print
					Departure	

a. 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 Lestrangle Pending <div>Accept</div> <div>Reject</div> <div>Delete</div> <div>Print</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

Lestrangle, 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	Beatrix Lestrangle Accepted <div>Revert</div> <div>Print</div>
1	Return	
	Departure	

Assign School Driver

Driver Aides

Carp Pending

Accept

Reject

Delete

Print

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.

Driver Acceptance Form

MB604-Transportation Field Trip (2019) 0031 To [redacted]
 One-Time Trip #1285 As of: 08/08/2019 02:42PM
 [redacted] HIGH SCHOOL Status: Assignment
 1707 16TH ST Type: Regular
 [redacted], FL 32 Sponsoring Org: Athletics
 Ker [redacted] ynn
 Depart: 08/28/2019 03:10PM Return: 08/28/2019 07:30PM Elapsed Time: 04:20

Total Stds: 48 Adts: 1 Whls: 0 Whls Aides: 0
 Transportation By: Sa [redacted] eo 08/08/2019 02:42PM
 Assignment By: Her [redacted] ca S 08/08/2019 02:42PM
 Bus: 001 Driver: 001
 Driver: 7006 Sa [redacted]

Drivers Signature: _____ On: _____
 Date MM/DD/CCYY and Time

Accept Trip Refuse Trip

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.

Manually Assign Bus Driver

All [dropdown arrow] Assign Cancel

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

Pending Approval Approval History Current Field Trip		
2019 - 2020 ▾		
Field Trip to Zoo		
Field Trip Type N/S	Creator Lestrangle, Beatrix	Created Date 01/30/2020
Requesting Facility		

Field Trip Drivers

Adam		Pending
Beatrix Lestrangle		Accepted
Driver Aides		
Carp		Pending

Complete Field Trip

1. From the **Transportation** menu, click **Outside Field Trip Request**.

Trans...

Huma...

Search...

Field Trips

Field Trip Request

Internal Field Trip Request

Outside Field Trip Request

Setup

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

Outside Field Trip Request

Budgeti...

Purchas...

Account...

Fixed A...

Transp...



Drafts

Templates


Field Trip History

Current Field Trip

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

Field Trip History										
Hide All Users										
<div> <div>Prev</div> <div>Page: 2 / 10</div> <div>Next</div> <div>Export:  </div> <div>Filters: OFF</div> </div>										
Status	Created Date	Start Date	End Date	# of Students	# of Adults	# of Wheelchairs	# of Bus Aides	# of Buses	Completed	
Approved	07/10/2019	07/12/2019	07/12/2019	85	5	0	0	2	No	View
Approved	07/09/2019	07/12/2019	07/12/2019	80	8	0	0	2	No	View
Approved	07/02/2019	07/01/2019	07/12/2019	100	0	0	0	3	No	View
Approved	07/02/2019	07/01/2019	07/12/2019	60	0	0	0	2	No	View
Approved	07/02/2019	07/01/2019	07/12/2019	60	0	0	0	2	No	View
Pending	07/02/2019	07/01/2019	07/12/2019	100	0	0	0	3	No	View

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.


Outside Field Trip Request

Budgeti...

Purchas...

Account...

Fixed A...

Transp...

Human ...

Payroll

Work Or...

Drafts

Templates

Field Trip History

Current Field Trip

Complete Field Trip

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

Drafts

Templates

Field Trip History

Current Field Trip

Complete Field Trip

2019 - 2020

swimming

Approved Info

Number

Field Trip Type

Creator

Created Date

Requesting Facility

Sponsoring Organization

Date

1124

N/S

Mani

07/10/2019

9032 EXTENDED DAY PROGRAM

Extended Day

07/12/2019

Recurring

No

of Students

of Adults

of Wheelchairs

of Bus Aides

of Buses

85

5

0

0

2

Requested By

Pick Up Contact

Final Destination

bart@schools.org

bart@schools.org

8301 EXT DAY

Finalized Info

of Students

of Adults

of Wheelchairs

of Bus Aides

of Buses

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

Finalized Info

of Students

85

of Adults

5

of Wheelchairs

0

of Bus Aides

0

of Buses

2

Drivers

Bus #	Employee	Starting Mileage	Ending Mileage	Arrive At	Returned At
	Ro				
	Edw				
	Jean				
	Fre				

Total Mileage

Final Cost

Print Unofficial Invoice

Complete 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

Bus #	Employee	Starting Mileage	Ending Mileage	Arrive At	Returned At
12	Rob	1000	1030	09:00 am	11:30 am
5	Edw	12000	12040	08:30 am	11:00 am
	Jean				
	Fre				

Total Mileage

70

Final Cost

150

Print Unofficial Invoice

Complete Collection

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.

Transportation Setup Employee Self Service

me ZOO

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	Aln	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
☒ 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.

Drivers/Aides
No Records Found

Sunpass
 \$

Other Expenses
 \$

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

Total Mileage

Final Cost

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

Final Cost

- 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 an Outside 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.

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

To edit accounts, click the pull-downs to change selections or click into any of the text fields that are underlined in blue. 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. There is also a Scan File button next to the Select button for direct scanning. Click the **Scan File** button; 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.

FOCUS **Lizette** 2019-08-07

Field Trip Request

Number	Creator	Created Date	Date Range	Recurring
1292	32153	2019-08-07	2019-09-19 – 2019-09-19	No

Field Trip Status	# of Students	# of Adults	# of Wheelchairs	# of Buses
U	25	0	0	1

Locations

Pick Up				Drop Off			
Date	Time	Facility	Location	Date	Time	Facility	Location
2019-09-19	09:00 am	0041 ELEMENTARY	Loop	2019-09-19	09:45 am	ZOO	Parking Lot B
2019-09-19	02:00 pm	ZOO	Parking Lot B	2019-09-19	02:45 pm	0041 ELEMENTARY	Loop

a. To print, click the **printer** icon located in the upper right corner of the screen. Note: If you do not see the black bar across the top of the screen or any of the icons, move your pointer over the window to make it appear. 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. You can also expand the window, zoom in, and zoom out using the three icons on the right side of the screen.

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.

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

Field Trip History

Hide All Users

Page: 1 / 10

Export:

Filters: OFF

Creator	Name	Number	Type	Status	Created Date
Ken	Volleyball	1295	District	Pending	08/09/2019
Ken	SWIMMING	1285	District	Approved	08/06/2019

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.

Drafts

Templates

Field Trip History

Current Field Trip



Field Trip History

Hide All Users



Prev

Page: 3 / 10

Next

Export:  

Filters: OFF

Creator	Name	Number	Type	Status
Bet	SRHS to Treasure Coast 10/3 VO	1270	District	 Pending
Bet	SRHS to TBD 10/14 VO	1271	District	 Pending

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.

Drafts

Templates

Field Trip History

Current Field Trip



Field Trip History

Hide All Users

Prev

Page: 1 / 2

Next

Export:  

Filters: ON

+

+

socc

-

swim

+

Contains

Not

Equals

Not

Starts with

Not

Ends with

Not

Has value

Not

Greater

Not

Greater or equal

Not

Less


Not


Less or equal

Not

Between

Not

Creator	Name	Number	Type	Status
Kenc	SWIMMING	1285		
Kenc	SWIMMING	1286		
Kenc	SWIMMING	1287		
Kenc	SWIMMING	1288		
Cop	Volleyball/Soccer	1289		
Cop	Volleyball/Soccer	1290	District	 Pending

 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.



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

2019 - 2020

Field Trip History

Hide All Users

Prev Page: 1 / 10 Next

Export:  

Filters: OFF

Creator	Name	Number	Type	Status	Created Date	Start Date	End Date	# of Students	# of Adults
Bini	AFTERSCHOOL BUSES TUES & THUR	1134	District	Pending	07/12/2019	09/03/2019	09/03/2019	45	0
War	Band 9/27/2019	1149	District	Pending	07/16/2019			120	10
War	Band 10/5/19	1151	District	Pending	07/16/2019	10/05/2019	10/05/2019	200	25
War	Band 10/12/19	1150	District	Pending	07/16/2019	10/12/2019	10/12/2019	200	20
War	Band 10/12/19	1152	District	Pending	07/16/2019	10/12/2019	10/12/2019	280	30
War	Band 10/18/19	1146	District	Pending	07/16/2019	10/18/2019	10/18/2019	120	10

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.

Sponsoring Organization

ch

Chorus
Charter
Chorus - Elementary
Clubs
C
Academics
Academics-Federal
SAC
SAC 5102
Vocational