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Compass Field Trip

Approver Manual

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Compass Field Trip

Approver Manual

Introduction

Compass Field Trips gives school districts the ability to request field trips, approve field trips, and manage the trips using digital resources rather than depending on a paper trail. The web-based application allows the Transportation Department to assign drivers and vehicles according to the requirements of a trip without having the challenge of gathering details which may have been incomplete in a paper format.

Software Requirements

- Internet Explorer (v 8.0 or higher), Google Chrome(v 10.x.xxx.xxx), Mozilla Firefox (v 2.0 or higher), Apple Safari (v 4.0 or higher)
- It is best viewed 1024 x 768 Screen resolution or higher
- Adobe Reader to view the printer friendly request form and other pdf reports
- Network connectivity to the server hosting the application

Recommended Hardware Requirements

- Processor: 1 GHz Processor or higher
- Memory: 2 GB or more
- Disk Space: At least 5 GB or more

System Workflow

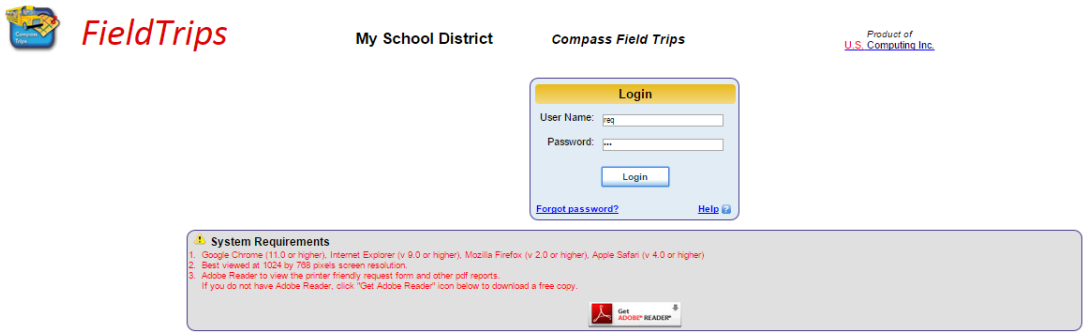
Workflow involved in the field trip system is as follows:

- Trip Requester places a new trip request
- Approvers, if any, approve or reject the request
- Transportation User adds one or more permits (Vehicle and Driver assignments) based on the number of passengers (students and adults) and vehicle requirements
- Trip Requester can view the permits (bus, driver assignments)
- Requester receives e-mail alerts whenever approver approves or rejects the trip request
- Driver receives paperwork with details of trip; form with hours, mileage and applicable notes to be completed and returned to Transportation User upon return.

Login

Compass Field Trips application is accessed by entering the application's URL into your Internet browser window. Please contact administrator for the application login URL.

This is the login screen.

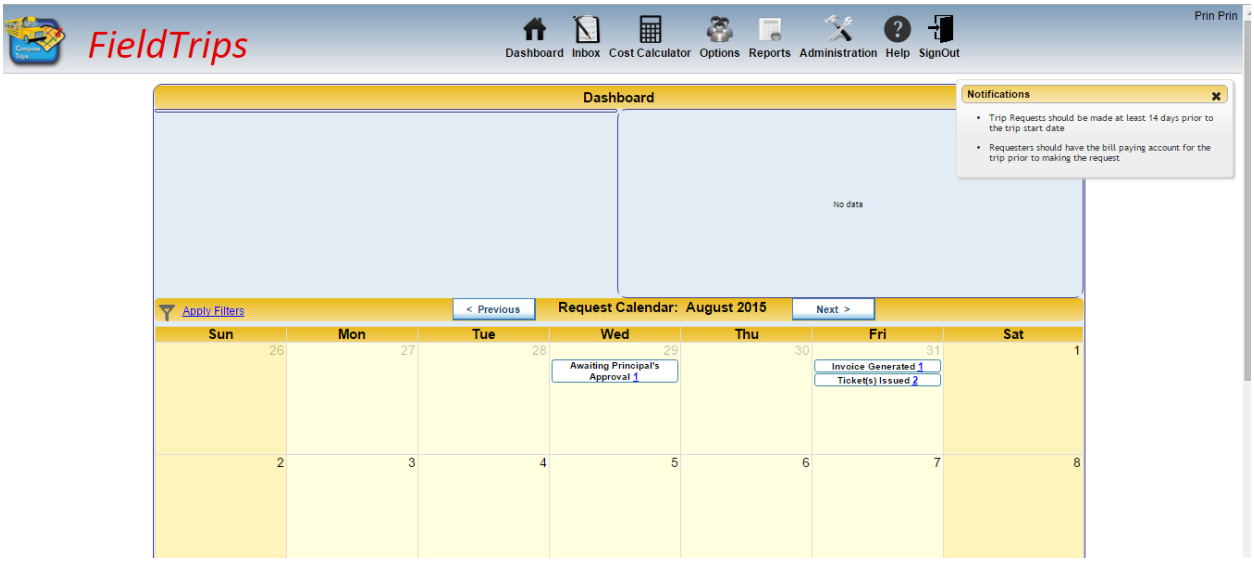


Enter your user name and password. Passwords are case sensitive. The program will then open to the Compass Field Trip Dashboard.

Roles and Permissions in Field Trip are set by the Transportation Department User/Administrator.

Dashboard

After a successful login, a Dashboard screen is displayed with a calendar view showing trips by day, requests and their status.

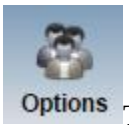


Inbox

The Inbox icon on the Dashboard redirects the user to the **Inbox** screen which lists out all the requests with several attributes like trip start date, trip end date, the activity, number of passengers and current status**.**

Using the in the Inbox, the Approver has access to the form to create new trips. Options are also available to filter the trips shown in the Inbox, copy trips and change the view from the trips requested to trips with permits. From the Inbox, all or selected trips may be exported to Excel.

The Cost Calculator tool gives the user an opportunity to figure the costs of the planned trip to insure the funds are available for the trip.



The Options tool allows the User to change their password and add or delete the Status options for their own trips.

The Reports tool opens the report builder so the User can create reports regarding trips.

The Administration tool opens a screen showing any Administration functions that have been granted to the User.

The Help tool opens to the user manuals for Field Trip.

The SignOut tool is the appropriate way to close the application.

Reviewing Trips for Approval

The Approver, whether a principal, athletic director, or other school official, has the ability to approve, cancel, reject, or delete a trip, which has been created by a Requester.

1. Log into Compass Field Trips.

2. Open the Inbox

to see a list of trips created by the Requesters who report to you. Any trips waiting for approval will be listed in the Status field.

Request #	Submission Date	Start Date Time	End Date Time	School	Destination	Requestor	Passengers	Activity	Status
2332	08/14/2015	9/30/2015 9:30 AM	9/30/2015 12:30 PM	Holly Springs Motlow Elem School	Campobello Gramling School	req req	32	Science Fair	Awaiting Principal's Approval
2333	08/14/2015	9/9/2015 9:00 AM	9/9/2015 12:00 PM	Holly Springs Motlow Elem School	Landrum High School	Transporation User	21	Academic	Awaiting Principal's Approval
2331	08/13/2015	9/2/2015 9:00 AM	9/2/2015 1:50 PM	Campobello Gramling School	Landrum High School	req req	43	Band	Awaiting Principal's Approval
2329	08/12/2015	8/31/2015 8:50 AM	8/31/2015 4:50 PM	Campobello Gramling School	Brooks Center Performing Arts	req req	40	Band	Saved as Draft

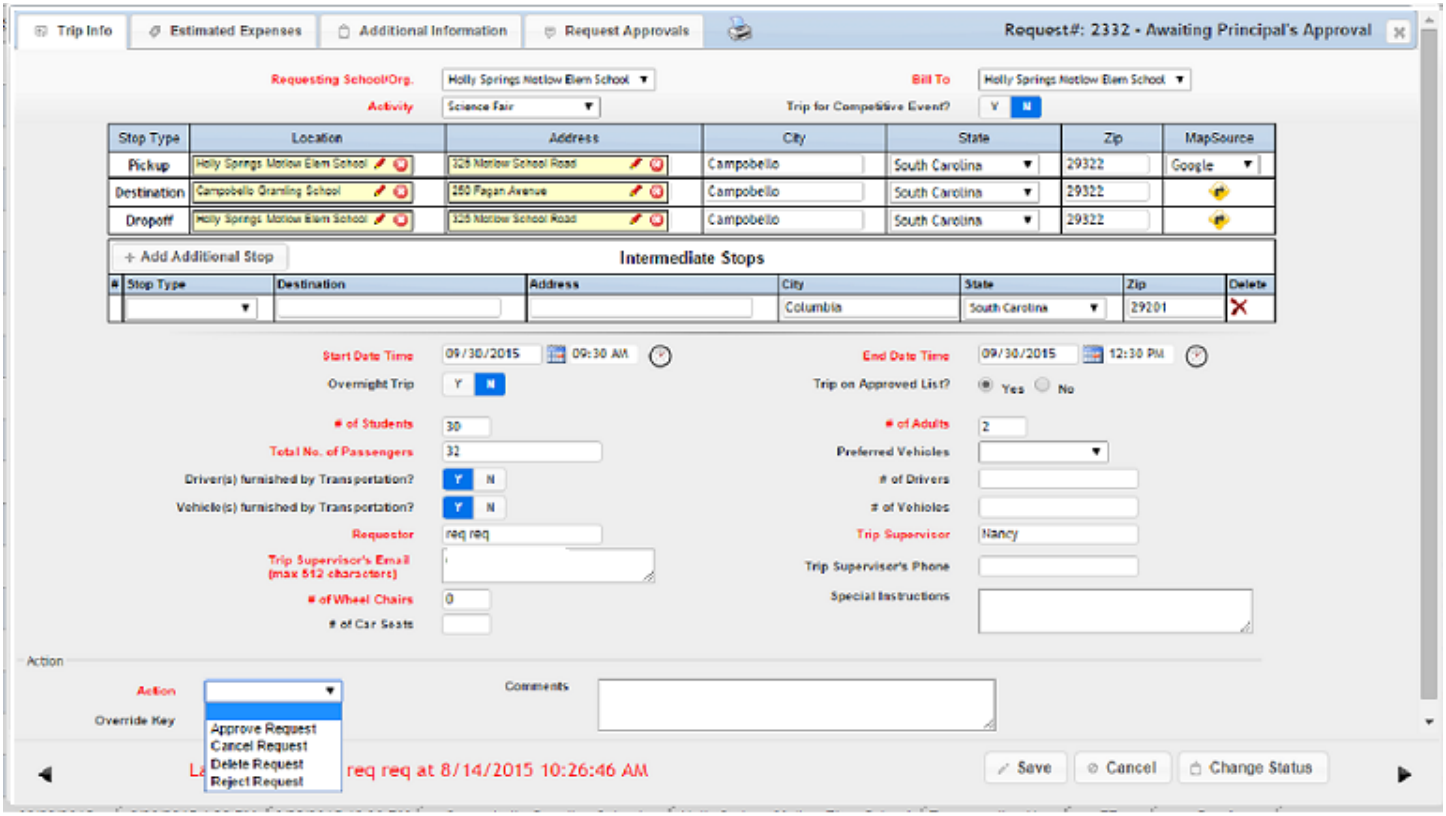
The field may be sorted by clicking on the field name to group all of the trips needing approval.

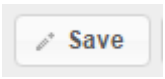
2328	08/12/2015	8/31/2015 7:40 AM	8/31/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball	Awaiting Athletics Director's Approval
2330	08/12/2015	9/1/2015 7:40 AM	9/1/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball	Awaiting Athletics Director's Approval
2331	08/13/2015	9/2/2015 9:00 AM	9/2/2015 1:50 PM	Campobello Gramling School	Landrum High School	req req	43	Band	Awaiting Principal's Approval
2314	07/15/2015	7/29/2015 6:00 AM	7/29/2015 2:00 PM	Highland HIgh School	Kerry's Zoo	Transporation User	21	Band	Awaiting Principal's Approval

3. Click on the Request # of a trip needing approval.

2332	08/14/2015	9/30/2015 9:30 AM	9/30/2015 12:30 PM	Holly Springs Motlow Elem School	Campobello Gramling School	req req	32	Science Fair	Awaiting Principal's Approval

The trip form will open for review by the Approver.



5. Following review of the trip, Approver selects the Action which is appropriate. Then click Save. 

An email will be generated to let the Transportation User know there is a new trip and the Requester that action has been taken on their trip request.

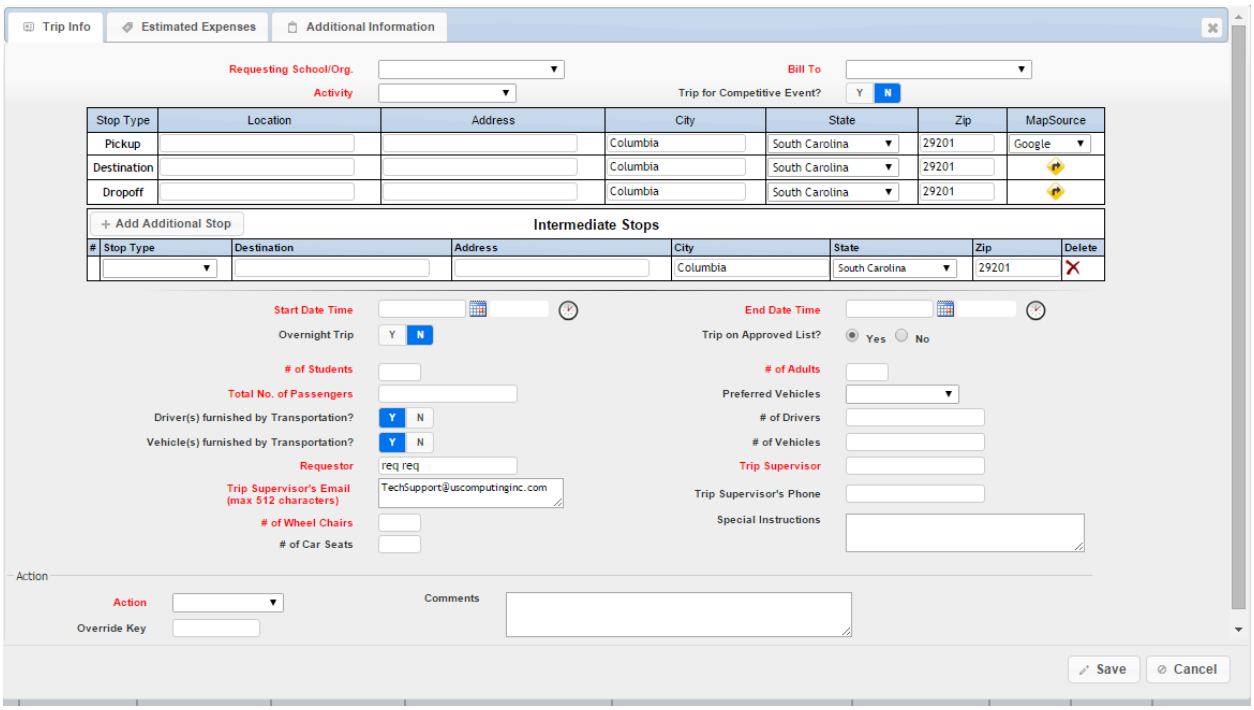
The Status in the Inbox will change to Accepted for Processing, if the trip was approved; Cancelled, if the trip was cancelled; Deleted, if the trip was deleted; and Rejected by Approver, (Principal, Athletic Director or Other Approver) if the trip was rejected.

If a trip has been Rejected, the Requester may make changes to the original request and re-submit it for approval.

If a trip was approved and Accepted for Processing, Transportation User will then assign drivers, vehicles, and generate trip tickets. Following the completion of the trip, the Transportation User will then be able to generate invoices to bill the appropriate parties for reimbursement to Transportation for the costs of the trip.

Create a new trip

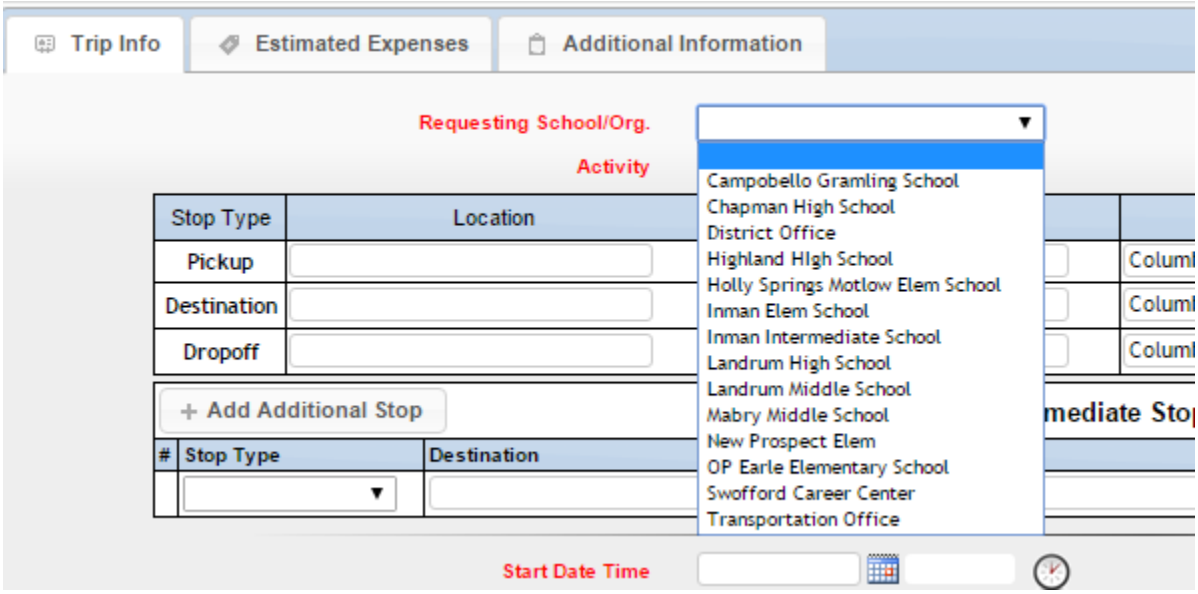
1. Open the Inbox. Click on the to open the form to create a new trip. The empty form will look like this.



NOTE: All fields in **red** are mandatory fields. The Requestor cannot submit a trip with any of these fields incomplete.

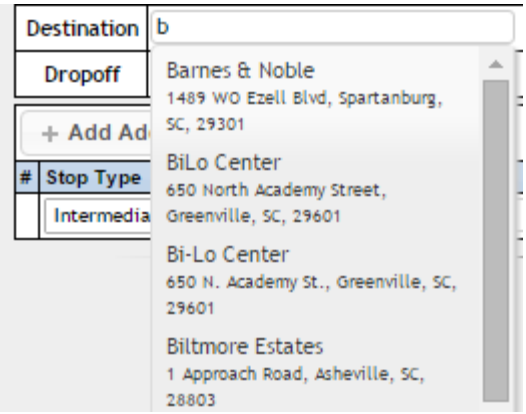
2. Fill in the fields with the requirements for your trip.

NOTE: Many of the fields, including Requesting School/Org, Activity, Pickup and Drop off locations, destinations will have pre-loaded information provided by your school district and available for you when you begin using the application.

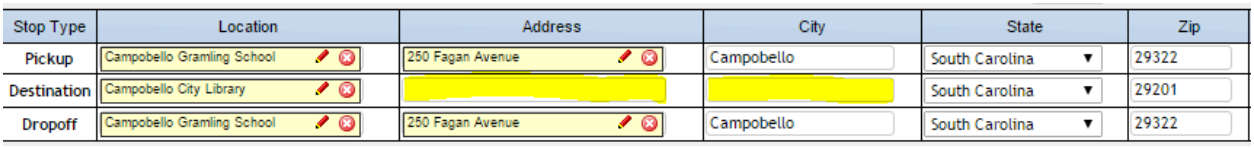


When the Requesting School field is filled, the Pickup and Drop off locations will auto-fill in the form.

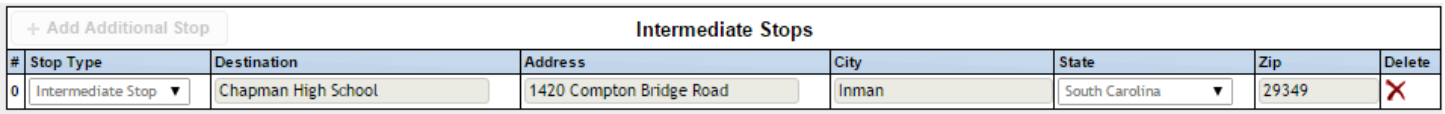
Just start typing your destination and if the destination is in the system, that destination and any others with the same beginning letters will appear in a drop down for you to choose from.



If it is a new destination, enter the information into the destination field, address, city, state and zip.

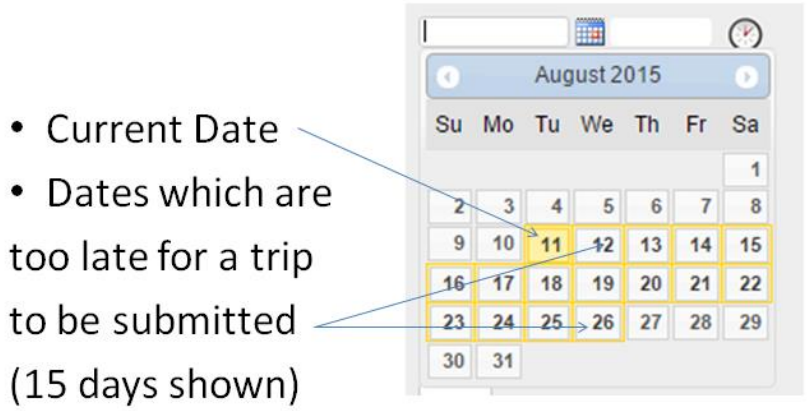


Requester may enter “Intermediate Stops” such as a stop for lunch, additional location etc. in the Intermediate Stop area.

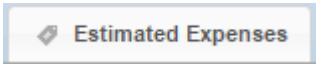


SUGGESTION: This is a great way to plan a performance trip for choral and band trips with performance stops at multiple places.

A calendar is available to choose the date of the trip. As shown below, the calendar is marked showing:



If you need to submit a "short-notice" trip, call Transportation for an Override Key. They can give you a code to enter for the trip to be submitted.

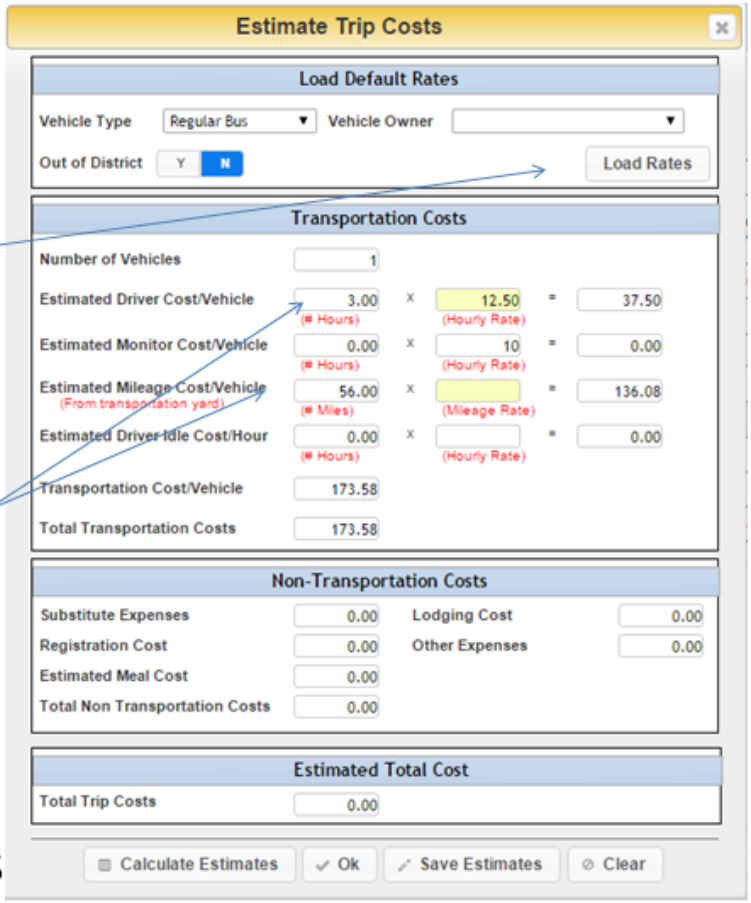
On the 

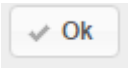
tab, there are options to calculate the cost of the trip to help in planning and budgeting for the planned trip.

Use the

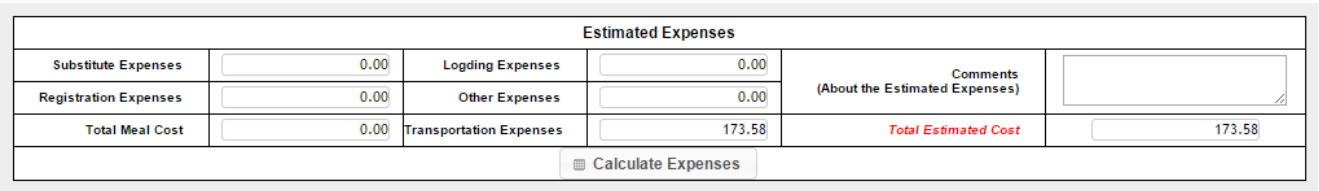
button to open the expense calculator.

- Load the rates your district uses for driver costs
- Enter estimated time & miles
- Enter non-trans-portation costs
- Calculate & Save the Estimates

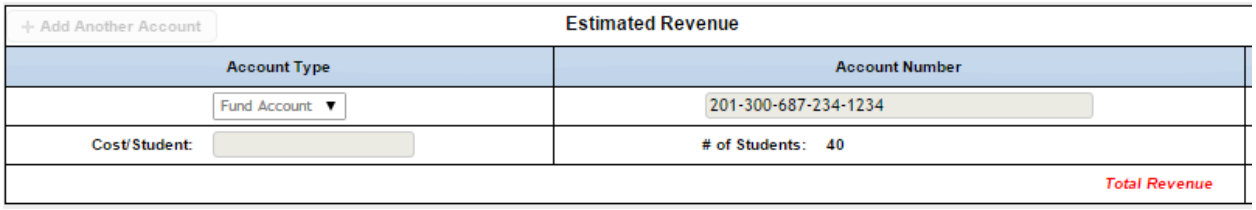


Don't forget to click 

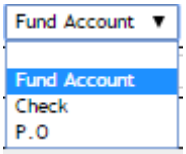
to bring the information into the Estimated Expenses Screen.

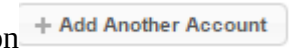


NOTE: When you entered your Activity, in this example Baseball, the associated Fund Account information automatically populated the Account number in the "Estimated Revenue" screen.



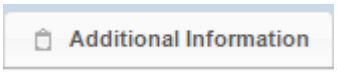
If the trip is being subsidized by someone other than the District, the Booster Club or PTA for example, there is the option in the Account Type drop down to choose the funding.



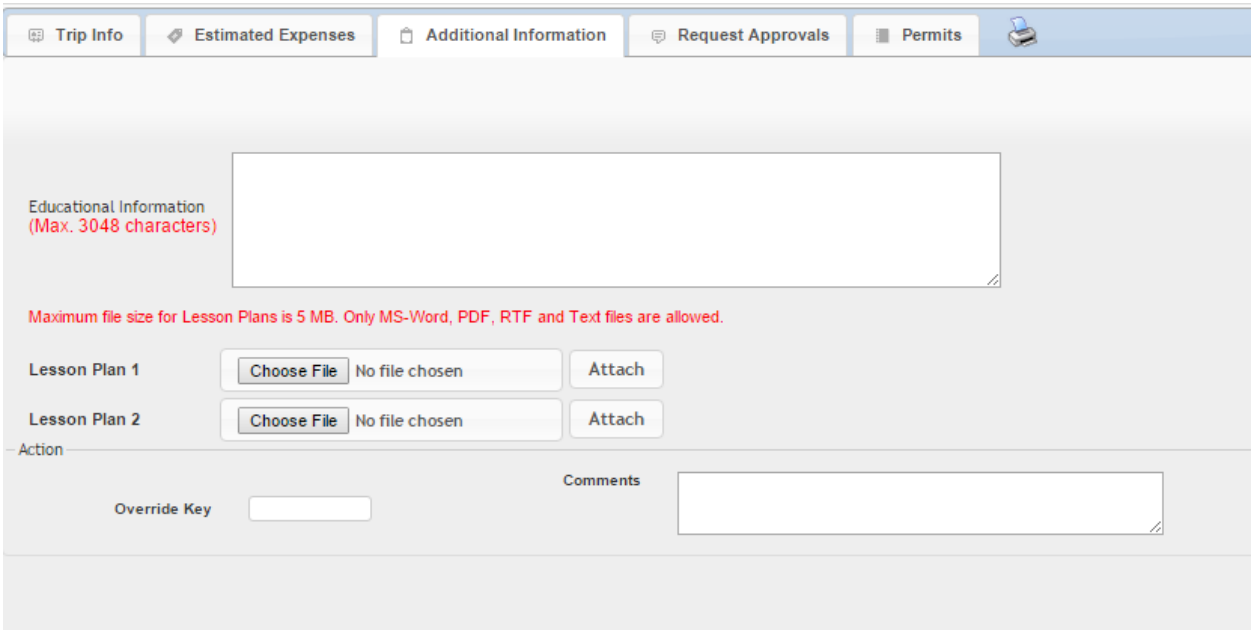
If the costs will be shared, click on 

, choose the type of funding and add information in the "Account Number" area.

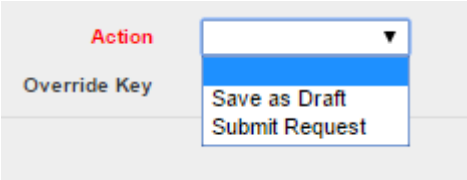
NOTE: The Total Revenue is not a mandatory field even though it is in red. This is information for the Transportation Department to know how the trip is being funded.

The third tab, 

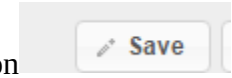
, is available for requesters to supply information which may be mandatory for education field trips regarding the purpose of a trip and goals to be met, for example. If the District has a policy regarding Lesson Plans in conjunction with field trips and information being available to Principals, the School Board, or other reviewing personnel, two lesson plans may be attached in addition to a large field to enter Educational Information.



To finish creating your Trip, Click on the Action drop down:

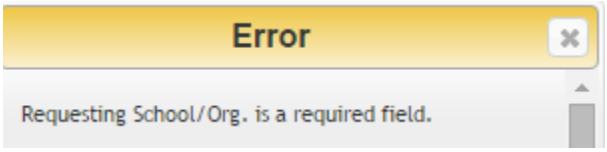


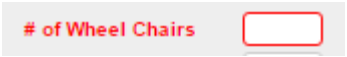
The requester can either "Save as Draft" if there has been an interruption while completing the form or "Submit request."

If the trip is ready for submission click on the Save button 

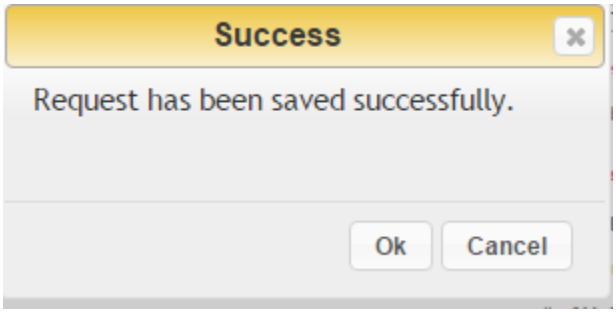
.

If there are any incomplete mandatory fields, you will get an error!



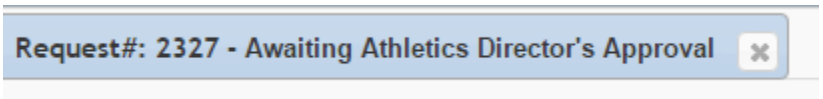
All incomplete fields will be outlined in red: 

If there are no errors or incomplete fields, the application will ask for confirmation.



Click OK.

The trip will have a Request # along with the status posted in the upper right hand corner of the trip request.



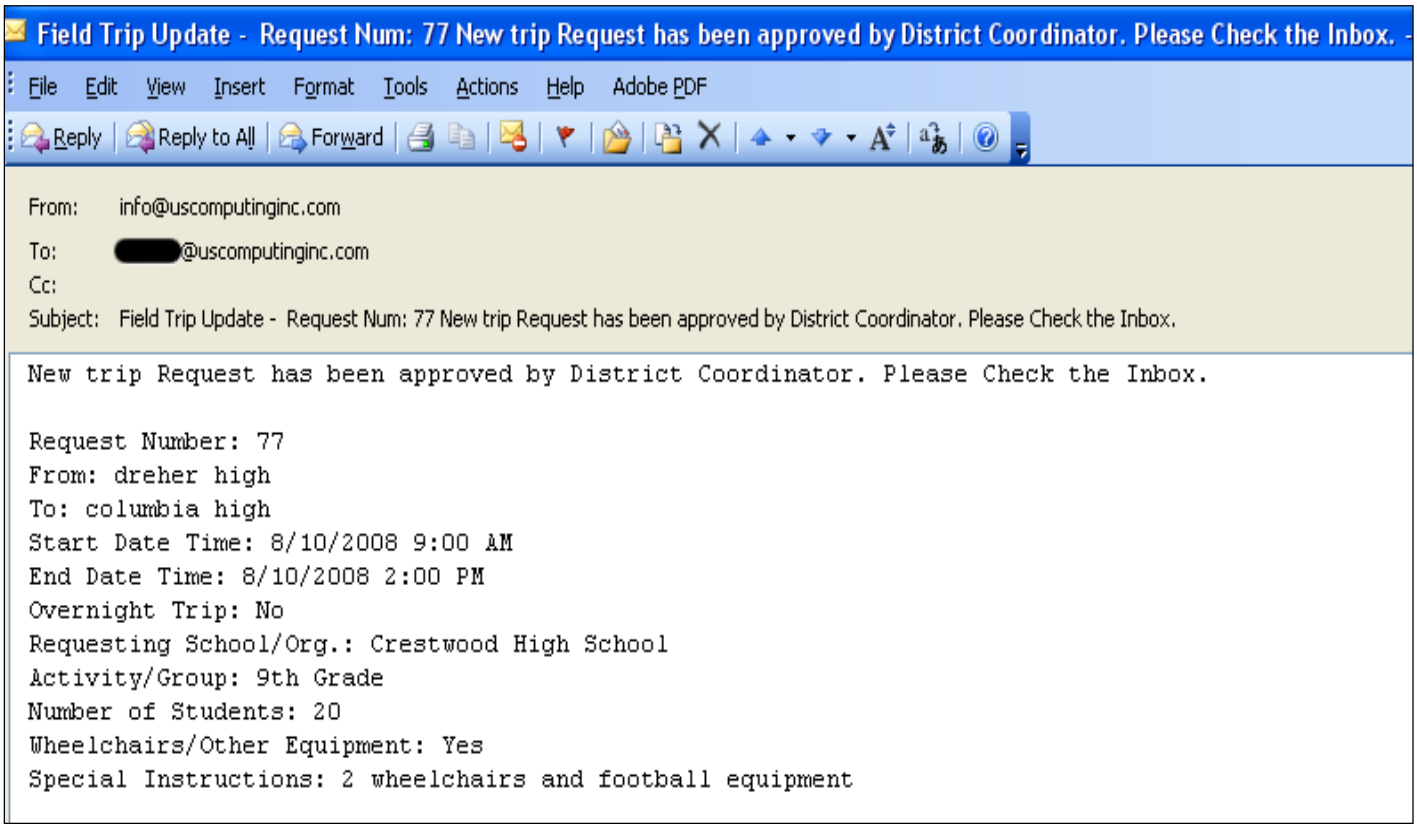
A new line will be added to the Inbox showing the new trip which was created.

☐	2327	08/11/2015	8/27/2015 7:40 AM	8/27/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball

E-mail Alerts

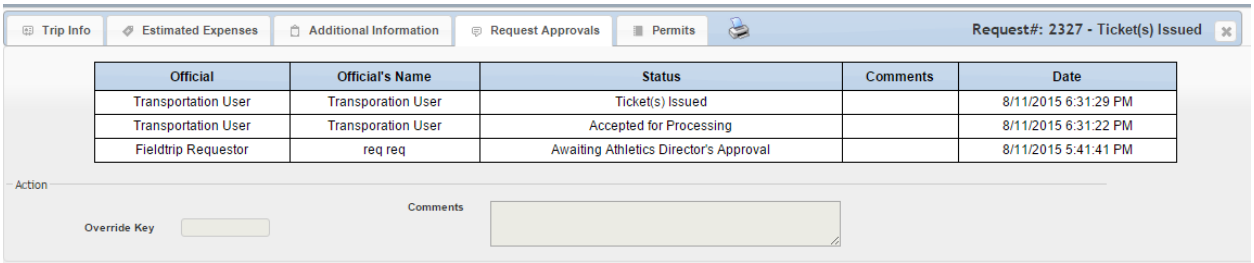
When the Requester submits a trip, an email is automatically generated and sent to the next level for approval.

When an approver takes some action on new Trip Request, an Email alert is sent to the Requester.



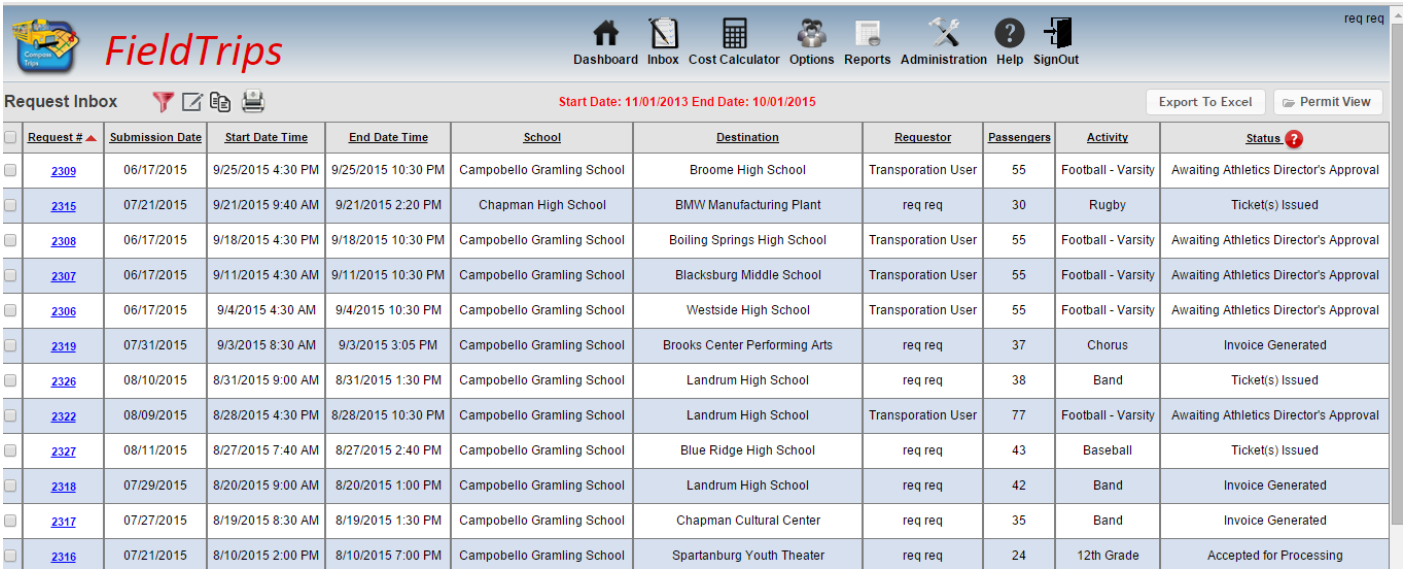
An e-mail alert will be received by the requester when an action has been taken by the trip approver. Requester can view his Inbox for details.

Upon submission of a trip, a new tab is added to the Trip Request Form and the Requester is able to see details about each step in the progress of their trip in the system.



Inbox

The Inbox consists of a detailed list of all the trip requests.



Request #	Submission Date	Start Date Time	End Date Time	School	Destination	Requestor	Passengers	Activity	Status
2309	06/17/2015	9/25/2015 4:30 PM	9/25/2015 10:30 PM	Campobello Gramling School	Broome High School	Transporation User	55	Football - Varsity	Awaiting Athletics Director's Approval
2315	07/21/2015	9/21/2015 9:40 AM	9/21/2015 2:20 PM	Chapman High School	BMW Manufacturing Plant	req req	30	Rugby	Ticket(s) Issued
2308	06/17/2015	9/18/2015 4:30 PM	9/18/2015 10:30 PM	Campobello Gramling School	Boiling Springs High School	Transporation User	55	Football - Varsity	Awaiting Athletics Director's Approval
2307	06/17/2015	9/11/2015 4:30 AM	9/11/2015 10:30 PM	Campobello Gramling School	Blacksburg Middle School	Transporation User	55	Football - Varsity	Awaiting Athletics Director's Approval
2306	06/17/2015	9/4/2015 4:30 AM	9/4/2015 10:30 PM	Campobello Gramling School	Westside High School	Transporation User	55	Football - Varsity	Awaiting Athletics Director's Approval
2319	07/31/2015	9/3/2015 8:30 AM	9/3/2015 3:05 PM	Campobello Gramling School	Brooks Center Performing Arts	req req	37	Chorus	Invoice Generated
2326	08/10/2015	8/31/2015 9:00 AM	8/31/2015 1:30 PM	Campobello Gramling School	Landrum High School	req req	38	Band	Ticket(s) Issued
2322	08/09/2015	8/28/2015 4:30 PM	8/28/2015 10:30 PM	Campobello Gramling School	Landrum High School	Transporation User	77	Football - Varsity	Awaiting Athletics Director's Approval
2327	08/11/2015	8/27/2015 7:40 AM	8/27/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball	Ticket(s) Issued
2318	07/29/2015	8/20/2015 9:00 AM	8/20/2015 1:00 PM	Campobello Gramling School	Landrum High School	req req	42	Band	Invoice Generated
2317	07/27/2015	8/19/2015 8:30 AM	8/19/2015 1:30 PM	Campobello Gramling School	Chapman Cultural Center	req req	35	Band	Invoice Generated
2316	07/21/2015	8/10/2015 2:00 PM	8/10/2015 7:00 PM	Campobello Gramling School	Spartanburg Youth Theater	req req	24	12th Grade	Accepted for Processing

The Inbox may be sorted by any field whose field name is underlined, for example, Request #, Submission Date, Start Date Time. Only the trips of the Requester will be in the Requester's Inbox.

The Inbox grid displays the following columns

- Request Number – Every request is given its own request number.
- Submission Date – this is the date on which this request was submitted by the Requester
- Start Date Time – this is the trip start date and time of the trip
- End Date Time – this is the trip end date and time of the trip
- School Name – this is the School making the request
- Destination – this is the place to which the group will be traveling on the trip
- Requester – this is the person who is making the request
- Passengers – Total number of passengers including students and adults
- Activity - Type of activity
- Status – indicates the current status for that request

The following tools are available in the Inbox:

Use the filter tool to see a specific date range of trips, activity, or school's trips. See Sort & Filter for details.

Use the New tool to create a new trip request. See Create New Trip for details.

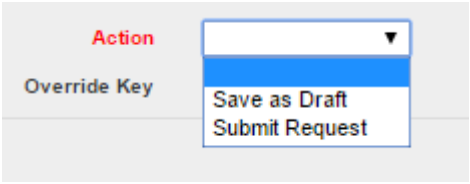
Use the Copy tool to copy a specific trip's details. See Copy a Trip for details.

Use the Bulk Print tool to print the trip requests for selected trips.

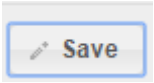
Save a Trip As Draft

If the requestor does not have all the required information to submit the request or they are interrupted while completing the New Trip form, the requester can save the request as draft. They can edit and submit the draft later.

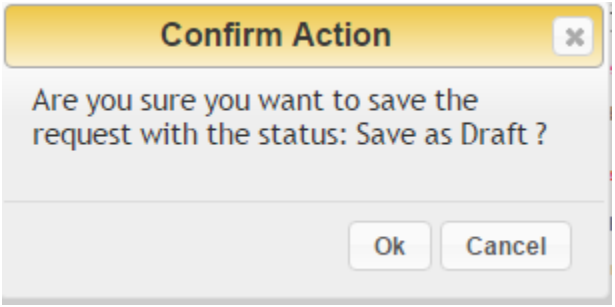
Pick the option "Save as Draft" in the action dropdown.



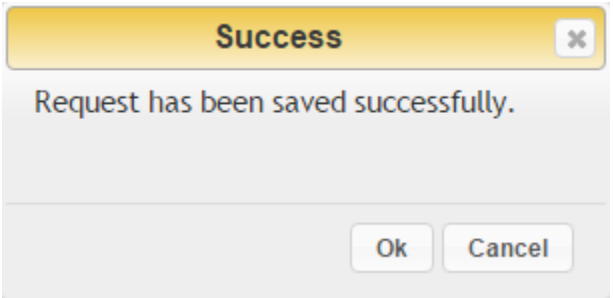
Click Save.



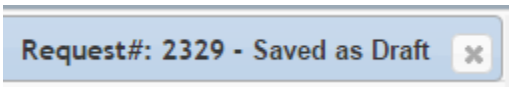
You will have an opportunity to confirm what you want to do. Click OK.



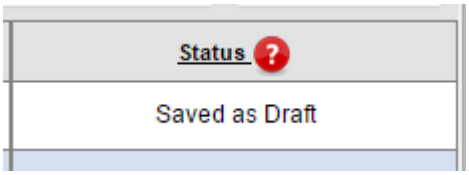
Click OK.



The Trip has been saved as a draft and given a request#.



The Trip is now in the Request Inbox



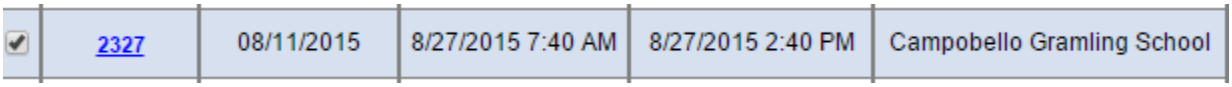
.

Copying a trip

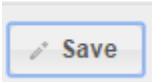
If the requester has a trip with almost all of the information that is needed for another trip, the original trip may be copied and revisions made in the data on the copied trip.

For example, a 2nd grade class going to the zoo. The next week a 3rd grade class is going. The majority of the information is the same. Copy the first trip. This will eliminate data entry to similar trips.

To copy a trip, put a check mark in the box in front of the trip you want to copy. Click on to create the copy.

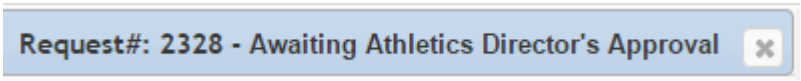


A copy of the original trip will open. Change the information in the original trip to create the copied trip. For example, the Start Date and End Dates, number of passengers, trip supervisor, and so forth.

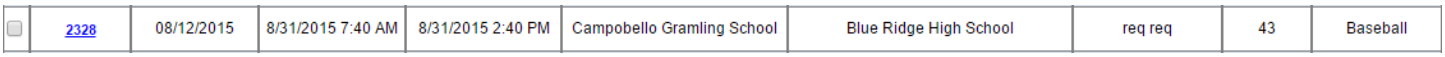
When the fields needing to be changed have been revised, click 

. The confirmation window will open. Click OK.

The new Request # will appear in the upper right hand corner of the trip form.



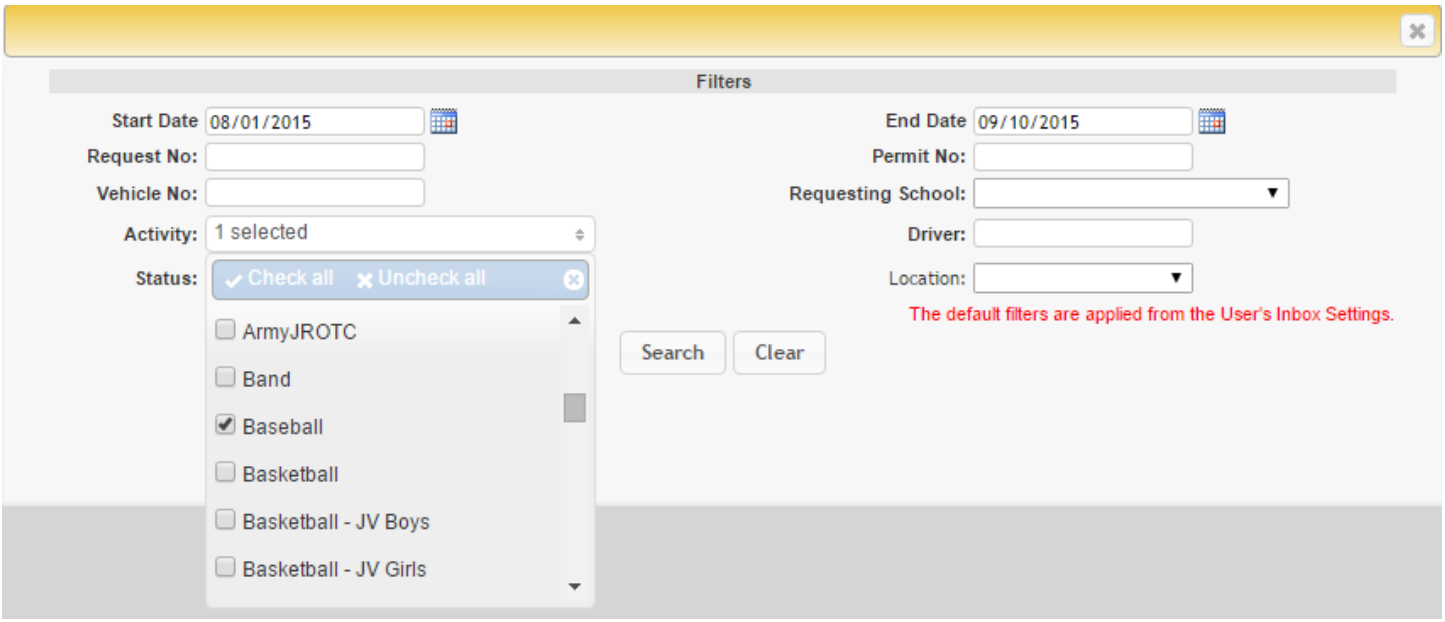
A new line will have been added to the Inbox.



Filtering and Sorting the Inbox

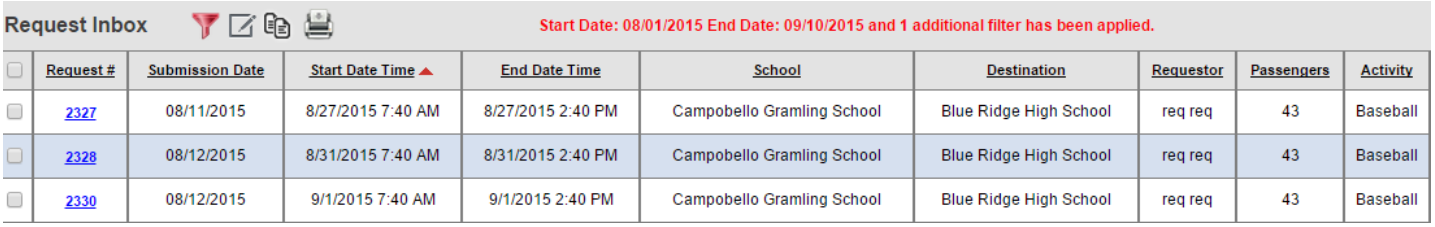
Using the , the requester can filter/query the information in the Inbox to easily narrow the selection of information to only a selection the requester wants to see.

Click on the to open the filters dialog box.



Filter the data by date range, Request #, Activity, or status of the trip. Select the options you want to use for your query and click on the Search button.

NOTE: If your query doesn't return the information you expected, clear the filter screen using the Clear button, and narrow your search. Too many or conflicting filters will result in no items in the Inbox meeting all criteria.



Request #	Submission Date	Start Date Time	End Date Time	School	Destination	Requestor	Passengers	Activity
2327	08/11/2015	8/27/2015 7:40 AM	8/27/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball
2328	08/12/2015	8/31/2015 7:40 AM	8/31/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball
2330	08/12/2015	9/1/2015 7:40 AM	9/1/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball

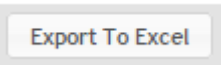
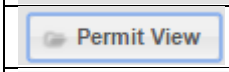
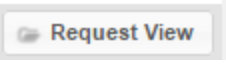
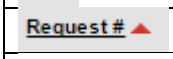
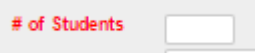
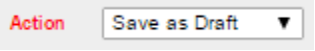
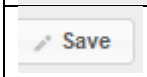
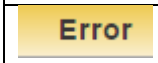
Glossary

Term	Description
Activity/Group	List of activities/groups
Bill Item	The item currently being billed
Bill To	The School/Org. that will pay for the trip
Bus Lot to School	The trip time and mileage information in going from the Bus Lot to the School
Bus Type	List of available vehicle types
Calc Amt	The calculated amount
Calc Type	The type of calculation involved; for example, flat rate or hourly rate etc.
Comments	comments by Requester, approver or processor
Date Range	The Start date and the End date for the Trip
Destination	Location where the bus will be going
Destination to School	The trip time and mileage information in coming from the Destination to the School
Estimated Driver Cost/per bus	Estimated driver cost per vehicle. It is equal to driver time (hours) multiplied by driver hourly rate.
Estimated Monitor Cost/per bus	Estimated monitor cost per vehicle. It is equal to monitor time (hours) multiplied by monitor hourly rate.
Estimated Mileage Cost/per bus	Estimated mileage cost per vehicle. It is equal to number of miles multiplied by rate per mile
Estimated Total Trip Cost/per bus	Estimated total trip cost per bus is the sum of driver, monitor and mileage charges per vehicle involved in the trip. These include transportation costs only.
Estimated Total Trip Cost	It is the sum of transportation costs for all vehicles

Educational Info	Information about the trip like what is the objective of this trip, what things are required, what is the planning for the trip etc
End Date	Date on which the trip ends
End Time	Time at which the trip ends
Entire Trip	The entire round trip time and mileage from the Bus Lot
Intermediate Stops	Places where the Requester wants to stop before reaching the final destination
Lesson Plans	are the attachments containing information that goes along educational info
Location	The bus-lot/site to which the Vehicle belongs
Total Male Students	Total Number of male students
Total Female Students	Total Number of female students
Origin	The place where the trip starts
Overnight Trip	Whether this trip is going to be overnight or not?
Payment Method	Mode of payment like Purchase Order, Check, Fund Account etc.,
Permit (Ticket)	Assignment of Vehicle(s) and driver(s) to request. One or more permits are associated with each request based on the number of passengers (students and adults)
Permit ID (Ticket ID)	Unique ID associated with a permit (vehicle and driver assignment)
Pick Up	The Place from where all the students/chaperones etc. will be picked up for the trip
Request No.	Each submitted Request is associated with a unique request number. One or more permits are associated with each request based on the number of passengers (students and adults)
Requester	Name of the person making the request
School	lists all the schools allowed to make trip requests

School to Bus Lot	The trip time and mileage information in coming from the School to the Bus Lot
School to Destination	The trip time and mileage information in going from the School to the Destination
Special Instructions	Any special instructions like number of wheelchairs, football equipment etc.,
Start Date	Date on which the trip starts
Start Time	The trip start time on the trip start date
Status	Current status of the request like New, Accepted for Processing, Permit(s) Granted, Billing Complete, Invoice Generated, Payment Received, Cancelled etc.,
Trip for Competitive Event	Whether this trip is for some competitive event or not?
Trip on Approved List	Whether this trip is on the Approved List of trips by School District or other District Authorities?
User Amt	The amount paid by user out of pocket and needs to reimbursed. Ex: Food, Damage, Clean-up Fee, Lodging and other miscellaneous expenses
Vehicles Needed	Preferred vehicle type requested by the Requester
Transportation Expenses	Includes the expenses for Driver, Monitor, Mileage etc.
Lodging Expenses	Includes expenses for having to stay overnight or some similar expenses.
Registration Expenses	Expenses for registering the student group to participate in an activity
Other Expenses	Other miscellaneous expenses.

Compass Field Trip Requestor Quick Reference Guide

IF YOU ARE A TRIP REQUESTOR:	
Dashboard	Click to return to the Dashboard/Calendar screen.
Inbox	Click to go to the user's Inbox.
Cost Calculator	Click to go to a dialog box to estimate the costs of a trip being planned for submission. This calculator is also on the Estimated Expenses tab in the trip form.
Options	Click to change password and inbox settings and other options directly related to the original permissions for the user.
Reports	Click to open the Report creation box.
Help	Open the help files: Trip Requestor's Manual, Trip Approver's Manual, Power User's Manual. All manuals are available for download.
SignOut	Sign out to exit the application properly.
	On the Inbox page, use the Filter button to query for a certain trip, or array of trips by date, date range, vehicle, driver, school, or activity.
	Copy a trip by selecting a previously created trip and then editing dates and other information. Bulk trips easily duplicated such as an entire season for a sport.
	Select any trip and print the information in the system for that trip.
 Export To Excel	Exports all records in the user's Compass Field Trip to Excel
 Permit View	Changes Inbox configuration to show Vehicle and Driver assignments.
 Request View	Only shows when in Permit View and will make the screen revert to original Inbox configuration.
	Create a new trip.
 Request #	The Trip ID # for any trip created.
Any Field Name	Click on any underlined field name to sort the data by the entries in that field.
 # of Students	In the Create Trip Form, any field in red is mandatory and must be completed to be able to submit the trip.
	Fields with a down arrow have a list of options to choose from. An administrator must add new entries if your entry is not available.
 Action Save as Draft	Complete the form and either save it as a draft or submit for approval.
 Save	Click the Save button in the lower right hand corner for final submission or to save as draft.
 Error	If you have incomplete mandatory fields, a dialog box showing fields to be completed will open.

Frequently Asked Questions

General Questions

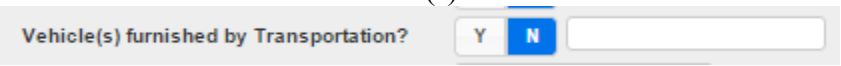
How to create another request with same information but with different dates?

Using the copy trip function, the requester may easily create a trip with the same information as previous trips. Please see the "Copying a Trip" for complete details.

How to notify processor about arrangement of own driver and own vehicle or both by the requester?

In the request form:

a) For own vehicle, select "Vehicle furnished by Transportation" option as No and enter the vehicle numbers in the "Vehicle Number(s)" field

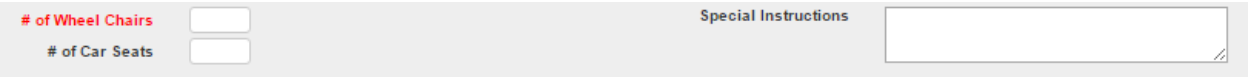


b) For own driver, select "Driver furnished by Transportation" option as No and enter the driver names in the "Driver Name(s)" field

Trip processor will understand the requester is arranging for their own vehicle and/or driver by the above selections.

How to notify processor about special needs requirements?

In the request form, enter desired number of wheelchairs in "# of Wheel Chairs" field or "# of Car Seats" and explain the details in the special instructions field.

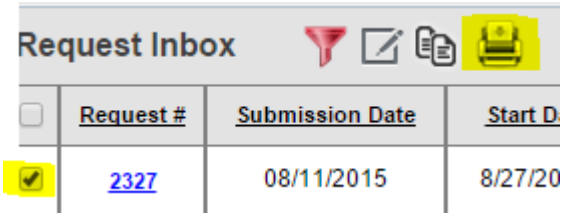


How to notify processor any special instructions?

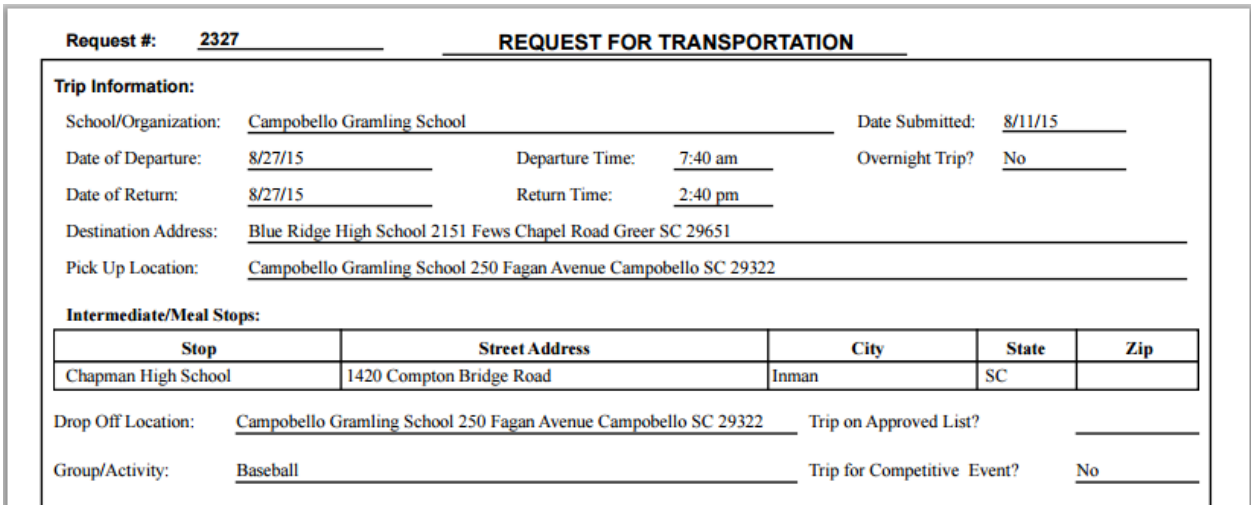
Enter any special instructions in the "Special instructions" field on the request form.

How to print a submitted Trip Request?

Users can print the request form by checking the trip or trips they would like to print. Click on the print icon.



The Trip Request will open in a new page.



Request #: 2327 **REQUEST FOR TRANSPORTATION**

Trip Information:

School/Organization: Campobello Gramling School — Date Submitted: 8/11/15

Date of Departure: 8/27/15 — Departure Time: 7:40 am — Overnight Trip? No

Date of Return: 8/27/15 — Return Time: 2:40 pm

Destination Address: Blue Ridge High School 2151 Fews Chapel Road Greer SC 29651

Pick Up Location: Campobello Gramling School 250 Fagan Avenue Campobello SC 29322

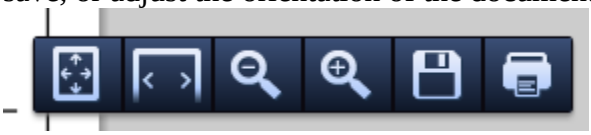
Intermediate/Meal Stops:

Stop	Street Address	City	State	Zip
Chapman High School	1420 Compton Bridge Road	Inman	SC	

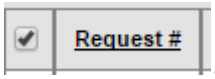
Drop Off Location: Campobello Gramling School 250 Fagan Avenue Campobello SC 29322 — Trip on Approved List?

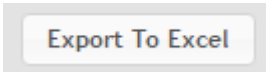
Group/Activity: Baseball — Trip for Competitive Event? No

A tool bar will be found at the bottom right hand side of the document to be printed. Use the tool bar to print, save, or adjust the orientation of the document.

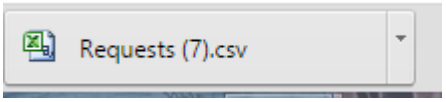


Can trip be exported to an Excel spreadsheet?

Select the trip or trip you want to export by checking the boxes in front of the trip or trips in the request inbox or place a check in the box in front of the "Request #" field to check all trips 

. Then click on the button at the upper right side of the Request Inbox 

to send information regarding the checked trips to an Excel spreadsheet. A big blue arrow will point to the file in the lower left area of the screen.



Click on this link to open the spreadsheet.

How to Edit/Cancel submitted Request?

Requestors cannot edit a submitted request.

Any trip cancellation/change requests must be sent to Transportation Office via e-mail or phone.

Only a Transportation User can

a) Edit submitted requests
b) Cancel submitted requests
c) Re-instate cancelled Requests

How to edit request saved as DRAFT and submit it?

Login to the application and go to Inbox Screen. Locate the request saved as draft and open the request by clicking on the request #. Fill in the rest of the trip information and submit the request.

Can rejected requests be submitted with changes?

Yes, Requestors can edit and modify the rejected requests and re-submit them.

Login to the application and go to Inbox Screen. Locate the request rejected and click on the rejected request # to open the form. Make the needed changes to the trip information and submit the request.