



Surveillance & Fleet Management Solutions for Student Transportation

Compass Field Trip

Transportation User Manual

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Compass Field Trip

Transportation User 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

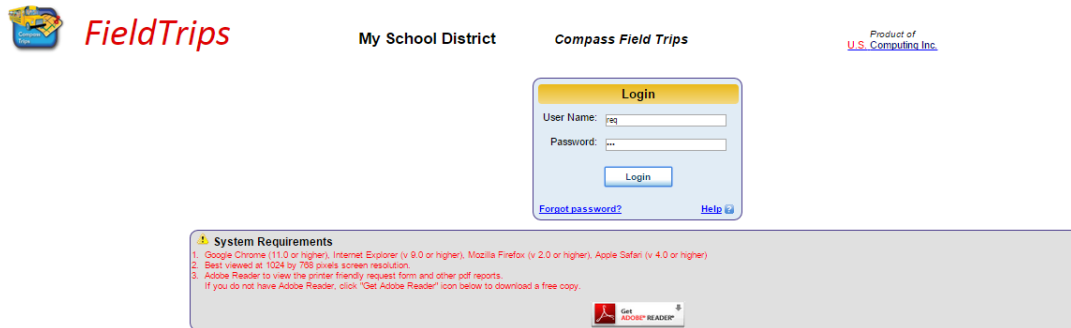
Workflow involved in the field trip system is as follows:

- 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.
- Transportation completes billing process per District procedures.

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.

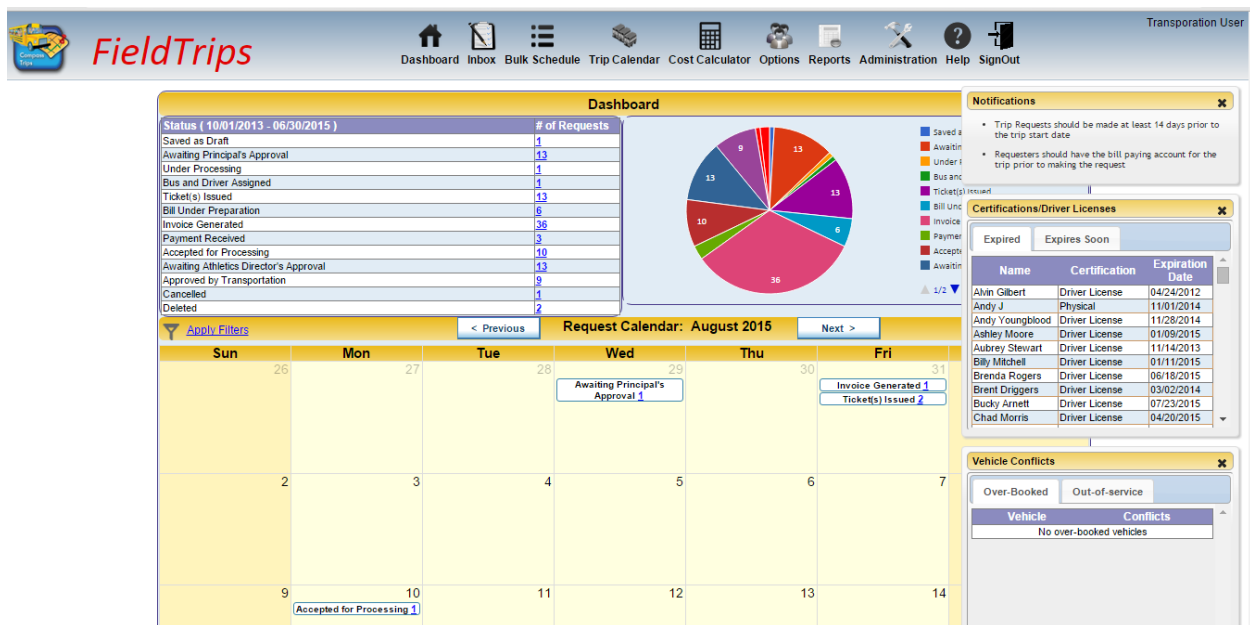
This is the login screen.



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

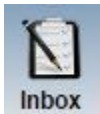
Dashboard

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




Dashboard

The Dashboard icon redirects the User to the Dashboard.



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 User will access the form to create a new trip. 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.

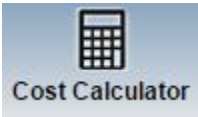


Bulk Schedule

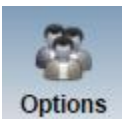
The Bulk Schedule icon opens the Bulk Schedules page providing access to current bulk scheduled activities and the form to generate additional bulk schedules.



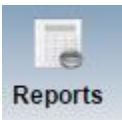
Trip Calendar The Trip Calendar icon opens the calendar by day, week or month to see all trips including information regarding driver, vehicle, times and permit number with a link to every trip.



Cost Calculator 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.



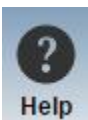
Options The Options tool allows the User to change their password and add or delete the Status options for their own trips.



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



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



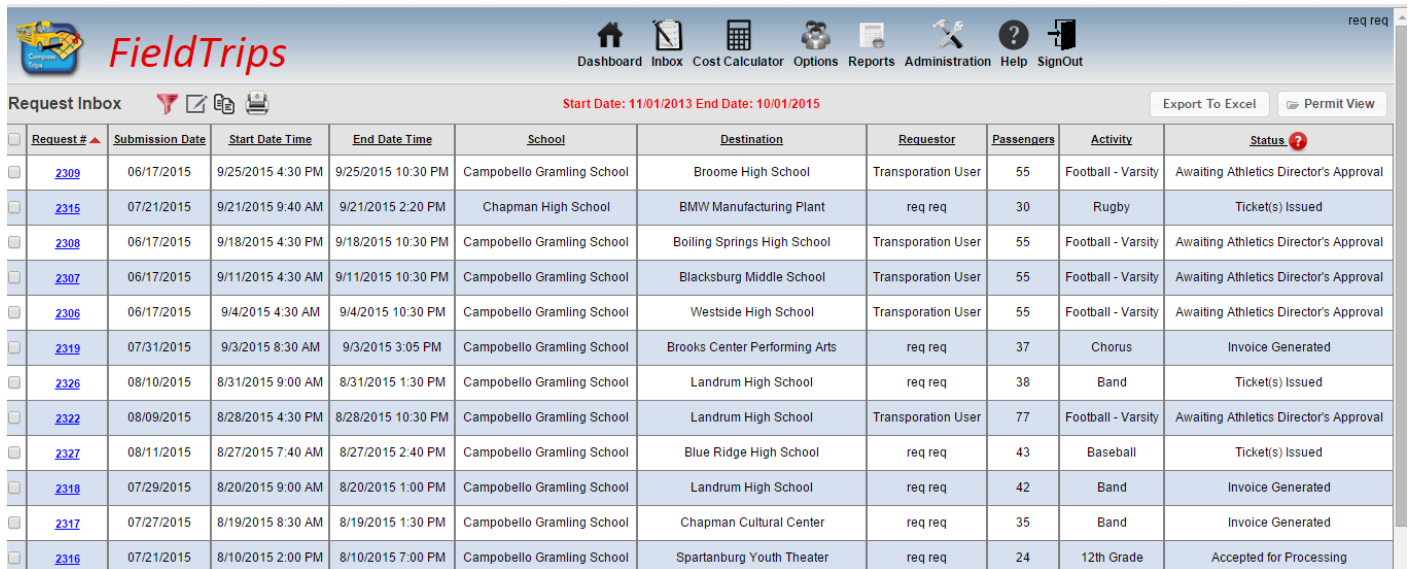
Help The Help tool opens to the user manuals for Field Trip.



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

Inbox

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



<u>Request #</u>	<u>Submission Date</u>	<u>Start Date Time</u>	<u>End Date Time</u>	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. If filters have been applied, they will be displayed in red at the top of the inbox.

Start Date: 07/01/2015 End Date: 06/30/2016 and 1 additional filter has been applied.



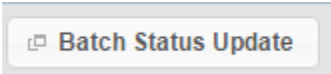
Use the New tool to create a new trip request. See Create New Trip for details.



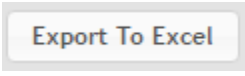
Use the Copy tool to copy a specific trip's details. See Copy a Trip for details.



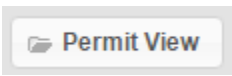
Use the Bulk Print tool to print the trip requests for selected trips.



The User is able to Change Request Status manually in the Inbox using the Batch Status Update button. One Request or multiple requests may be updated at once using this function.





The User is able to Export the contents of the Inbox to an Excel spreadsheet. Filter the contents of the Inbox to narrow the information that is exported to Excel.

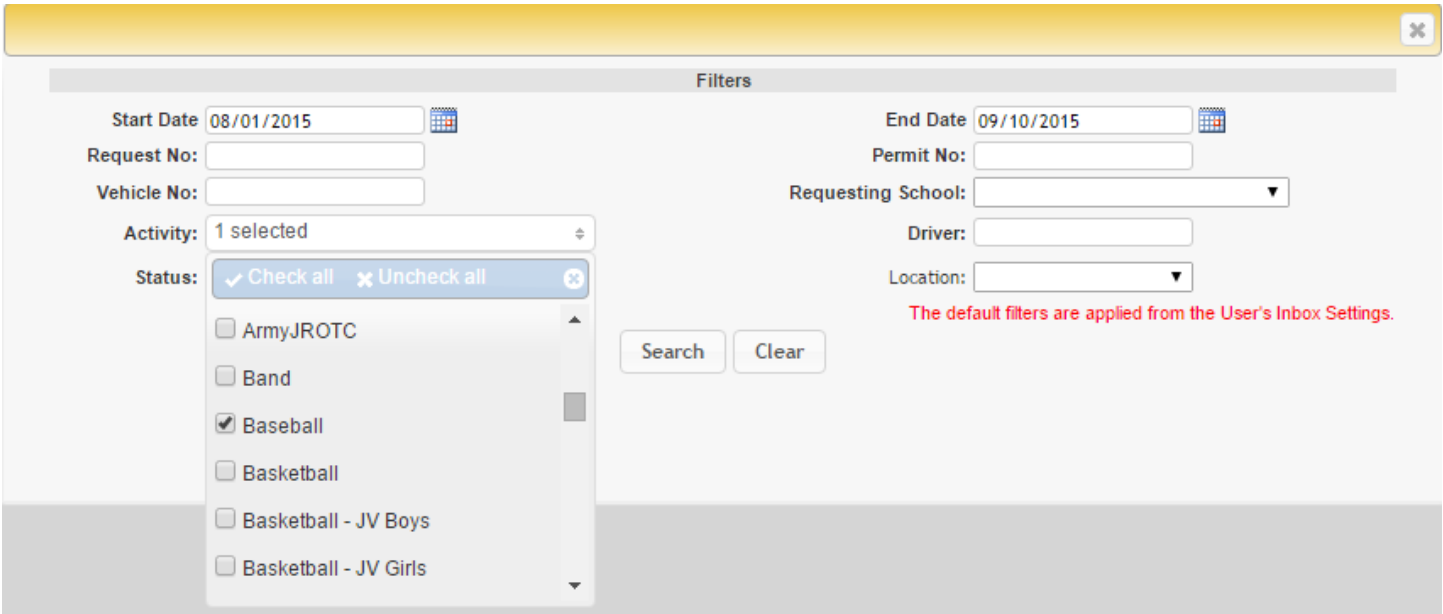


The Permit View button changes the fields displayed in the Inbox to show the fields which have been added to a trip in the Permit process. The permit fields included are the assigned vehicle and driver.

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.

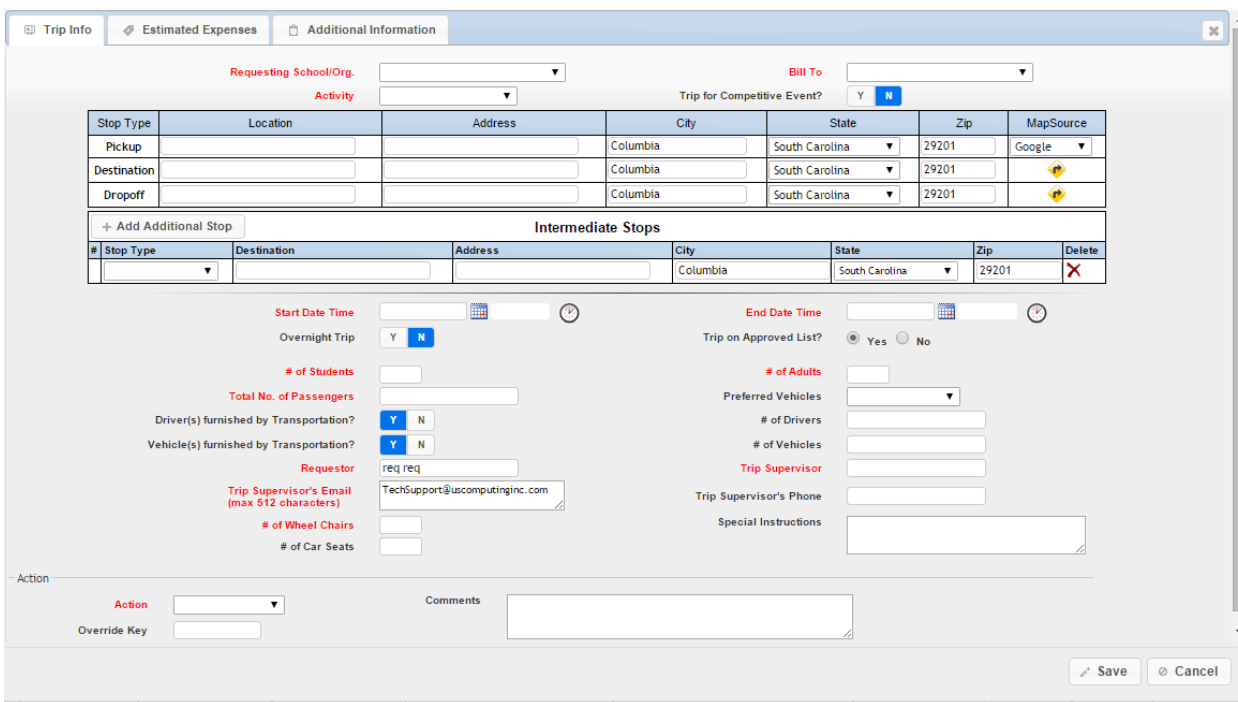
Request Inbox   									
Start Date: 08/01/2015 End Date: 09/10/2015 and 1 additional filter has been applied.									
<input type="checkbox"/>	Request #	Submission Date	Start Date Time ▲	End Date Time	School	Destination	Requestor	Passengers	Activity
<input type="checkbox"/>	2327	08/11/2015	8/27/2015 7:40 AM	8/27/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball
<input type="checkbox"/>	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
<input type="checkbox"/>	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

Trip Request Form

Create a new trip

Trip Details

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



The screenshot shows a web-based form for creating a new trip. It includes several sections:

- Requesting School/Org:** A dropdown menu.
- Activity:** A dropdown menu.
- Bill To:** A dropdown menu.
- Trip for Competitive Event?:** Radio buttons for 'Y' and 'N'.
- Stop Table:** A table with columns: Stop Type, Location, Address, City, State, Zip, MapSource. It contains three rows: Pickup, Destination, and Dropoff.
- Intermediate Stops:** A table with columns: #, Stop Type, Destination, Address, City, State, Zip, Delete. It contains one row.
- Start Date Time:** A date and time picker.
- End Date Time:** A date and time picker.
- Overnight Trip:** Radio buttons for 'Y' and 'N'.
- Trip on Approved List?:** Radio buttons for 'Yes' and 'No'.
- # of Students:** A text input field.
- Total No. of Passengers:** A text input field.
- Driver(s) furnished by Transportation?:** Radio buttons for 'Y' and 'N'.
- Vehicle(s) furnished by Transportation?:** Radio buttons for 'Y' and 'N'.
- Requestor:** A text input field with the value 'req req'.
- Trip Supervisor's Email (max 512 characters):** A text input field with the value 'TechSupport@uscomputinginc.com'.
- # of Wheel Chairs:** A text input field.
- # of Car Seats:** A text input field.
- Preferred Vehicles:** A dropdown menu.
- # of Drivers:** A text input field.
- # of Vehicles:** A text input field.
- Trip Supervisor:** A text input field.
- Trip Supervisor's Phone:** A text input field.
- Special Instructions:** A text area.
- Action:** A dropdown menu.
- Override Key:** A text input field.
- Comments:** A text area.
- Buttons:** 'Save' and 'Cancel' buttons.

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.

Trip Info | Estimated Expenses | Additional Information

Requesting School/Org.

Activity

Stop Type	Location
Pickup	<input type="text"/>
Destination	<input type="text"/>
Dropoff	<input type="text"/>

+ Add Additional Stop

#	Stop Type	Destination
<input type="text"/>	<input type="text"/>	<input type="text"/>

Start Date Time

Requesting School/Org. dropdown menu:

- Campobello Gramling School
- Chapman High School
- District Office
- Highland High School
- Holly Springs Motlow Elem School
- Inman Elem School
- Inman Intermediate School
- Landrum High School
- Landrum Middle School
- Mabry Middle School
- New Prospect Elem
- OP Earle Elementary School
- Swofford Career Center
- Transportation Office

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

Just start typing the 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 the User to choose from.

Destination

Dropoff

+ Add Ad

Stop Type

Intermedia

Dropoff dropdown menu:

- Barnes & Noble
1489 WO Ezell Blvd, Spartanburg, SC, 29301
- BiLo Center
650 North Academy Street, Greenville, SC, 29601
- Bi-Lo Center
650 N. Academy St., Greenville, SC, 29601
- Biltmore Estates
1 Approach Road, Asheville, SC, 28803

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

Stop Type	Location	Address	City	State	Zip
Pickup	Campobello Gramling School	250 Fagan Avenue	Campobello	South Carolina	29322
Destination	Campobello City Library			South Carolina	29201
Dropoff	Campobello Gramling School	250 Fagan Avenue	Campobello	South Carolina	29322

User may enter "Intermediate Stops" such as a stop for lunch, additional location etc. in the Intermediate Stop area.

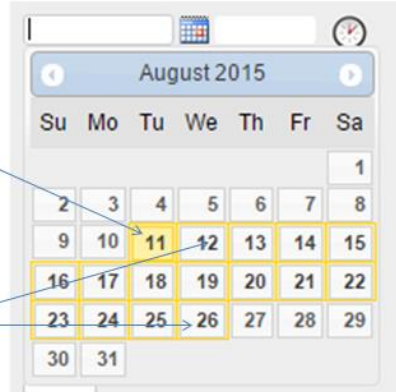
+ Add Additional Stop

Intermediate Stops							
#	Stop Type	Destination	Address	City	State	Zip	Delete
0	Intermediate Stop	Chapman High School	1420 Compton Bridge Road	Inman	South Carolina	29349	X

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:

- Current Date
- Dates which are too late for a trip to be submitted (15 days shown)



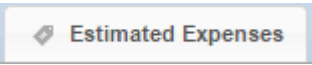
If there is a need to submit a “short-notice” trip, call Transportation for an Override Key. Transportation has all permissions to provide an override key to enter for the trip to be submitted.


Override Key hey R

When the User clicks on the clock, an AM and PM set of times open along with the minutes.

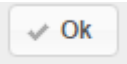
SUGGESTION: Define with your Requesters whether this is the time they want the bus to arrive at their pickup point or the time the Requester wants the bus to depart from the pickup time. Transportation can then allow time for pre-trip, deadhead to pickup point, and load time prior to departure.

Estimated Expenses

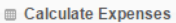
On the  **Estimated Expenses** tab, there are options to calculate the cost of the trip to help in planning and budgeting for the planned trip.

Use the  **Calculate Expenses** button to open the expense calculator.

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

Don't forget to click  **Ok** to bring the information into the Estimated Expenses Screen.

Estimated Expenses				
Substitute Expenses	0.00	Lodging Expenses	0.00	Comments (About the Estimated Expenses)
Registration Expenses	0.00	Other Expenses	0.00	
Total Meal Cost	0.00	Transportation Expenses	173.58	
			Total Estimated Cost	173.58

 **Calculate Expenses**

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.

+ Add Another Account		Estimated Revenue	
Account Type		Account Number	
Fund Account ▼		201-300-687-234-1234	
Cost/Student:		# of Students: 40	
			<i>Total Revenue</i>

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.

Fund Account ▼

 Fund Account
 Check
 P.O

If the costs will be shared, click on + Add Another Account, 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, Additional Information, 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. NOTE: The information in this tab may be made a mandatory entry if the District requires it.

Additional Information

Trip Info Estimated Expenses Additional Information Request Approvals Permits

Educational Information
(Max. 3048 characters)

Maximum file size for Lesson Plans is 5 MB. Only MS-Word, PDF, RTF and Text files are allowed.

Lesson Plan 1 Choose File No file chosen Attach

Lesson Plan 2 Choose File No file chosen Attach

Action Override Key Comments

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

Action

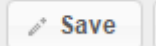
Override Key

Save as Draft

Submit Request

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.

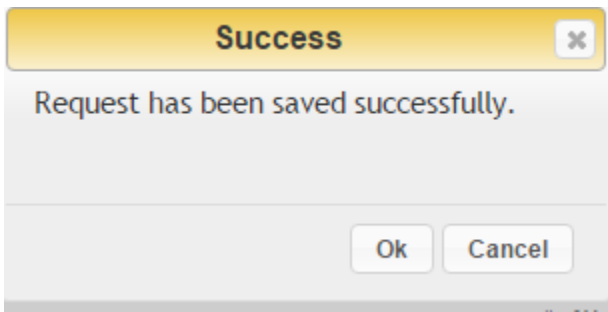
Error

Requesting School/Org. is a required field.

All incomplete fields will be outlined in red:

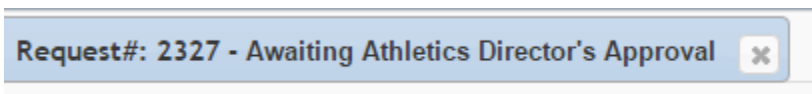
of Wheel Chairs

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.

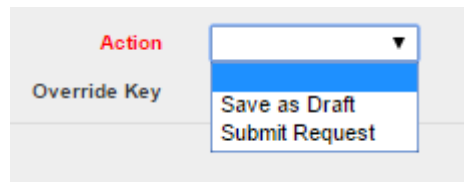


A new line will be added to the Inbox showing the new trip which was created.

<input type="checkbox"/>	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
--------------------------	----------------------	------------	-------------------	-------------------	----------------------------	------------------------	---------	----	----------

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.

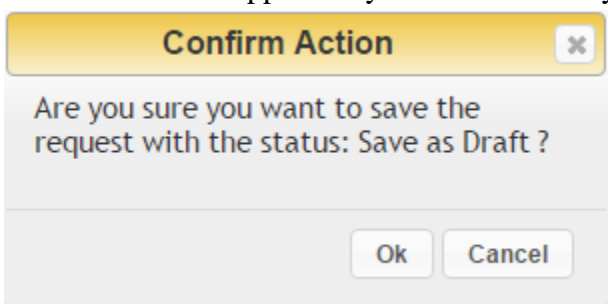


Pick the option "Save as Draft" in the action dropdown.

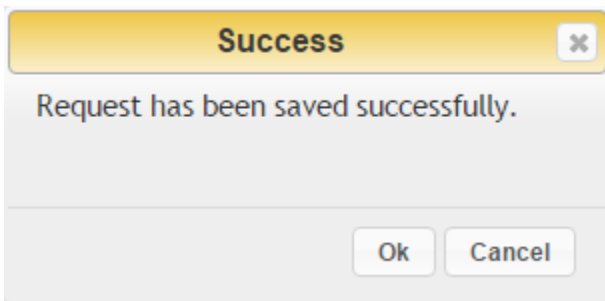


Click Save.

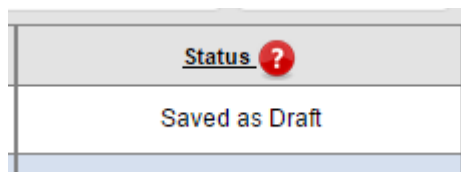
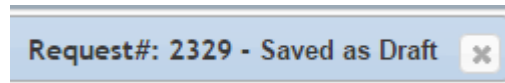
You will have an opportunity to confirm what you want to do. Click OK.



Click OK.



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




The Trip is now in the Requester's Inbox

Copying a trip

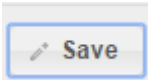
If the requester has a trip with almost all of the information that is needed for another trip, the original trip may be copied and revisions made in the data on the copied trip.

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.

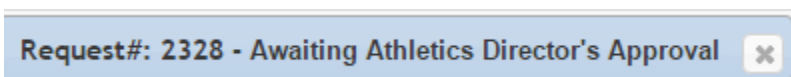
To copy a trip, put a check mark in the box in front of the trip you want to copy. Click on  to create the copy.

<input checked="" type="checkbox"/>	2327	08/11/2015	8/27/2015 7:40 AM	8/27/2015 2:40 PM	Campobello Gramling School
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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.


<input type="checkbox"/>	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
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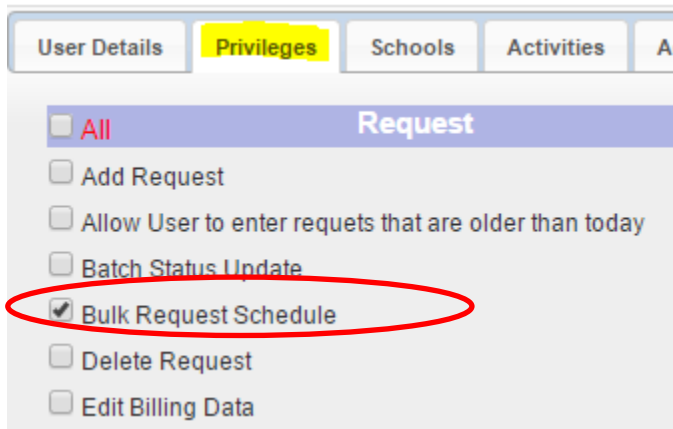
Bulk Scheduling

A Requester with the appropriate permissions, an Athletic Director, or Transportation User can create Bulk Schedules to accommodate full-season athletic schedules. This ability allows the User to enter the information into a basic request form and then add the needed number of lines with the dates of each of the events and the location to which the group will travel.

Add the Bulk Scheduling Permission

Edit

1. In the Administration area, Search for the User that is to have new or additional permissions. Click  to change or add permissions to their record.
2. Under the Privileges tab, select Bulk Request Schedule. Make sure and Save the change before you leave the User's record.




The screenshot shows a user record with the 'Privileges' tab selected. Under the 'Request' section, the 'Bulk Request Schedule' checkbox is checked and circled in red. Other options include 'Add Request', 'Allow User to enter requests that are older than today', 'Batch Status Update', 'Delete Request', and 'Edit Billing Data'.

Creating a Bulk Schedule



1. Click on  to open the Bulk Scheduling screen in Field Trip.

Bulk Schedules								
No.	Title	Academic Year	School	Activity	Active			Edit
1	Coach		Campobello Gramling School	Football - Varsity	Active			

Show Expired Bulk Schedules Show Deleted Bulk Schedules

[Add New Schedule](#)

Any existing bulk schedules will be there for review and edit.

2. Click  to add a new bulk schedule.

3. The Scheduled Requests for bulk scheduling will open and look like this:

Scheduled Requests

Title:

School Name: Chapman High School

Contact: Coach Jones

Email: bill.jones@our.district.net

Comments: Cross Country schedule 2015-16

Academic Year: 2015-16

Activity: Cross Country - Athletic Progi

Telephone:

Pickup At: Chapman High School Address: 1420 Compton Bridge Road City: Inman State: South Carolina Zip: 29349

Dropoff same as pickup

Dropoff At: Chapman High School Address: 1420 Compton Bridge Road City: Inman State: South Carolina Zip: 29349

Complete the information in the form. This information should be the same for the entire schedule such as the school name, activity, email address, pick up and drop off areas.

4. When the Scheduled Requests page opens, three lines will also appear in the form. Complete each line by adding the date for each event, pick up and drop off times, destination, etc. If the destinations are in your list of destinations, the address, city, state and zip will populate automatically.


Request Number	Bill To	Start Date*	End Date*	Pick-up Time*	Drop-off Time*	Destination*	Address*	City	State	Zip	# Students*	# Adults*	# Wheel Chairs*	# Car Seats	Vehicle Type	S.I	# Buses	Status	Ac
	Chapman High School	9/9/2015	9/9/2015	2:00 PM	8:30 PM	Campobello Gramling School	250 Fagan Avenue	Campobello	South Carolina	29322	25	4	0	0	Regular Bus		1		
	Chapman High School	9/18/2015	9/18/2015	2:00 PM	8:30 PM	Blacksburg High School	201 W Ramseur Road	Blacksburg	South Carolina	29702	25	4	0	0	Regular Bus		1		
	Chapman High School	9/23/2015	9/23/2015	2:00 PM	8:30 PM	Dreher HS	1345 Millwood Ave	Columbia	South Carolina	20901	25	4	0	0	Regular Bus		1		
									South Carolina										
									South Carolina										

Override Code:

Record(s) will be saved only if all the cells marked * in the grid rows are populated. Check grid column headers. Once submitted, requests cannot be edited by the requestor. Please contact transportation services administrator to edit any requests that are submitted already.


Save Add Request Rows

Click on Add Request Rows to have rows added 2 at a time to the rows originally on the form.

Click Save  to complete your bulk schedule. Each entry will be given a request # and now shows as 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
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
2334	08/24/2015	9/9/2015 2:00 PM	9/9/2015 6:30 PM	Chapman High School	Campobello Gramling School	Transporation User	29	Cross Country	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
2335	08/24/2015	9/16/2015 2:00 PM	9/16/2015 6:30 PM	Chapman High School	Blacksburg High School	Transporation User	29	Cross Country	Awaiting Athletics Director's Approval
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

The above example shows bulk trips for both Cross Country and Varsity Football.

5. The User can easily filter all trips by date range, activity, requesting school and then assign drivers, buses in advance or using the protocol or bid process for assigning drivers. 

Filters

Start Date:

End Date:

Request No:

Permit No:

Vehicle No:

Requesting School:

Activity:

Driver:

Status:

Location:

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.

<input type="checkbox"/>	Request #	Submission Date	Start Date Time	End Date Time	School	Destination	Requestor	Passengers	Activity	Status
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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.

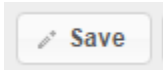
<input type="checkbox"/>	2328	08/12/2015	8/31/2015 7:40 AM	8/31/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball	Awaiting Athletics Director's Approval
<input type="checkbox"/>	2330	08/12/2015	9/1/2015 7:40 AM	9/1/2015 2:40 PM	Campobello Gramling School	Blue Ridge High School	req req	43	Baseball	Awaiting Athletics Director's Approval
<input type="checkbox"/>	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
<input type="checkbox"/>	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.

<input type="checkbox"/>	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
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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.

Permits & Trip Tickets

Following the submission and approval of a new trip, the Transportation User is now ready to create a permit and follow the district's process for assigning a driver and vehicle.

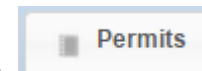
Create a Permit

1. The approved trip's status will now be "Accepted for Processing."

Campobello Gramling School	Spartanburg Youth Theater	req req	24	12th Grade	Accepted for Processing
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Click on the Request # to open the Trip Request.

2316	07/21/2015	8/10/2015 2:00 PM	8/10/2015 7:00 PM	Campobello Gramling School	Spartanburg Youth Theater
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2. The Request will open and an additional tab, Permits, is at the top of the form. Click on the Permits tab to open the Permits screen.

Add Permit													Bulk Print	Bulk Bid Print	<input type="checkbox"/> Show Deleted Permits
#	Ticket #	Start Point	End Point	Vehicle	Driver	Bus Mobile #	Status	Print	Bidding	View/Edit	Delete	<input type="checkbox"/>			
Request does not have any ticket. Click "Add Permit" to add a new ticket.															

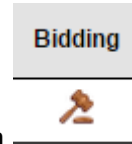
Click on the Add Permit button to open the form and create a ticket.

The ticket details will open showing the dates, times, pickup and drop off/return address, number of passengers, number of vehicles required. Notes fields and directions fields are included on the screen. This information will be added to the trip ticket.

Ticket Details		Ticket Number:		Created By: Transportation User	Last Updated By: Transportation User
Ticket Details					
Trip Start Date	08/28/2015	Trip End Date	08/28/2015	Notes: Bus with storage needed for equipment being transported with team. (Max. 512 chars.)	
Sched. Start Time	04:30 PM	Sched. End Time	10:30 PM	Directions:	
Starting Point	Pick Up - Campobello Gramling Sch	Ending Point	Drop Off - Campobello Gramling Sch		
Vehicle No.		Veh. Mobile No.			
Num. Of Vehicles	3	Vehicle Type	Regular Bus		
# of Passengers	77	Location			
Add New Personnel					
No.	Personnel Type	Personnel Name	Comments (Max. 256 chars.)		Delete
	Driver				X
Save Ticket					

OPTION: Bid Sheet

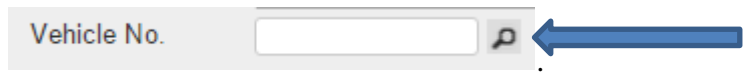
1. If there is a bid process for drivers in the district, the ticket may be saved by clicking the “Save Ticket” button at the bottom of the form.
2. Information will populate a form for a basic bid sheet with room for drivers to sign up if they are interested



in the trip, have time to do the trip, etc. Click on the Bidding icon. The form will open for printing and inspection by the drivers.

Add a Vehicle

3. Select the vehicle to assign to the trip by clicking on the



The Vehicle Search dialog box will open showing the list of vehicles in the fleet. Either search for the vehicle you want to use by type, location, or number or select a vehicle from the list displayed.

Select	123-56	Special Needs Bus		District Owned	Main Depot	Available					
Select	2	Regular Bus	78	District Owned	Transportation Office	Busy	Assigned to trip: 2325	07/01/2015	90300	0	0
Select	503-6393	Regular Bus	54	State Owned	Transportation Office	Available		06/09/2015	33	0	0

NOTE: The vehicles will show either Available or Busy depending on their use by Field Trip. If the trip is beginning during “route time,” the program will not know that and still show the vehicle as available.

Add the Driver

4. Assign a driver by clicking on



The Driver Search dialog will open with a list of drivers and their availability.

Driver Search

Last Name First Name
 Driver ID Vehicle Type
 Personnel Type Location
 License Expiration Date

Search

	Name	Emp. ID	Description	Location	Pay Rate	Weekly Hours	Phone	Availability	Reason	Hire Date	License Expiration Date	Last Week Hrs	Last Month Hrs
Select	Bateman, Sharon	000-00-2850	Regular Bus Driver	District Office	16			Available		1/1/2003	1/6/2017	0	0
Select	Bateman, Sharon	000-00-2850	Activity Driver	District Office	17			Available		1/1/2003	1/6/2017	0	0
Select	Allen, Klm	000-00-6891	Activity Driver	Transportation Office	10	40		Available		2/1/2014	12/3/2015	0	0
Select	Davis, Lorraine	000-00-4727	Teacher	Transportation Office	18			Available			12/22/2015	0	0
Select	Benfield, Toni	000-00-7881	Regular Bus Driver	Transportation Office	17	32		Available	Driver has not been to a fieldtrip for over 90 day			0	0
Select	Atkins, Kathy	000-00-0547	Regular Bus Driver	Transportation Office	16			Available			8/31/2017	0	0
Select	Dawkins, Mary	000-00-5597	Teacher	Transportation Office	18			Available	Driver has not been to a fieldtrip for over 90 day		12/19/2015	0	0

The User can either search for a specific driver by name, driver from a certain location/depot, by the type of vehicle the drivers are qualified to drive or select one from the list displayed when the dialog opens. Select the driver that will be assigned to the trip. The driver will be added as the driver in the Permit.

NOTE: If seniority is a factor, and the data is maintained in the drivers' records, the table may be reordered by the hire date.

Add Additional Personnel

If you need additional personnel on that vehicle for the trip, click on the Add New Personnel button.

Add New Personnel

In the additional line, the drop down for "Personnel Type" will now be available so that you may add other personnel and define their position and responsibilities for the trip. After you choose the type, select the person that will also be assigned to the trip from the "Personnel Name" list.

Add New Personnel

No.	Personnel Type	Personnel Name
1	Driver	Bateman, Sharon
1	Driver	<input type="text"/>

Save Ticket

Driver
 Monitor
 Special Needs Assistant
 Teacher/Chaperone
 Assistant/Trainee
 Other

When you have selected the second person and their role in the trip, the Permit will look like this:

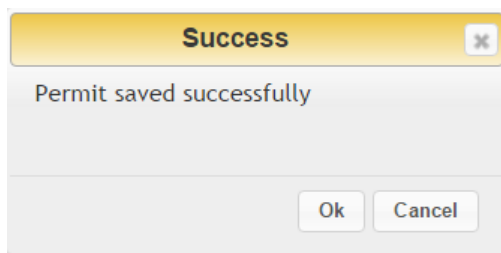
Add New Personnel				
No.	Personnel Type	Personnel Name	Comments (Max. 256 chars.)	Delete
1	Driver	Bateman, Sharon		X
2	Teacher/Chaperone	Davis, Lorraine	Referee on the bus	X

At any time you may delete any of the personnel for the trip and reassign the work to a different driver.

4. Fill in other blank fields in the Permit including any notes or directions for the trip, Mobile No. assigned to the vehicle or the driver, and the Location, which is where the vehicle is originally parked.

5. When all fields are filled with the information, click

Save Ticket



The application will notify the User the save was successful.

After the ticket is saved, click on

Issue Ticket

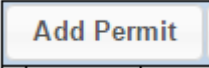
to give each ticket its own individual ticket number.

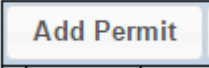
The status in the corner of the Trip Request will change to

Request#: 2322 - Ticket(s) Issued

Multiple Permits/Tickets for the same Trip Request









If a trip requires more than one vehicle, the User can add additional permits/tickets for each additional vehicle/driver to be assigned.



1. Click . The form will open with the same fields completed or left blank for the User to complete.
2. Follow all of the instructions the same way as for creating the original permit. Please note that the driver and vehicle which were selected for the first permit now show as Busy.

Select	123-56	Special Needs Bus		District Owned	Main Depot	Available					
Select	2	Regular Bus	78	District Owned	Transportation Office	Busy	Assigned to trip: 2325	07/01/2015	90300	0	0
Select	503-6393	Regular Bus	54	State Owned	Transportation Office	Available		06/09/2015	33	0	0

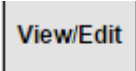
3. Information is filled in for each permit you create.

Add Permit <input type="checkbox"/> Bulk Print <input type="checkbox"/> Bulk Bid Print <input type="checkbox"/> Show Deleted Permits												
#	Ticket #	Start Point	End Point	Vehicle	Driver	Bus Mobile #	Status	Print	Bidding	View/Edit	Delete	<input type="checkbox"/>
1	2322-1	Campobello Gramling School	Campobello Gramling School	503-6395	Allen, Kim	555-555-5555	Ticket Issued					<input type="checkbox"/>
2	2322-2	Campobello Gramling School	Campobello Gramling School	11111	Bateman, Sharon	555.555.5553	Ticket Issued					<input type="checkbox"/>

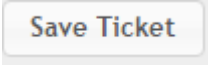
Update an Existing Permit

The User can amend or update a permit if it should become necessary.

1. Open the Request in the Inbox.



2. Click on  for the ticket needing updates to open the form.

4. Make changes and add information as necessary. When updates are completed, click . The "Success" dialog will appear. Click OK.


Printing Tickets

Trip tickets can be printed for the driver/s assigned to the trip.



1. Click on . The trip ticket will open in a separate window.



If you have multiple tickets, click on the  for each line to print the ticket with the correct information for each driver.

2. The top of the Field Trip Information Sheet will look like this:

My School District	
FIELD TRIP INFORMATION SHEET	
Ticket Number: 2322-1	Request Number: 2322
Date Submitted: <u>08/09/2015</u>	Approval Date: <u>08/25/2015</u>
Trip Type: <u>Football - Varsity</u>	
Trip Start Date: <u>08/28/2015</u>	Trip End Date: <u>08/28/2015</u>
Bus Arrival Time: <u>4:30 pm</u>	Bus Return Time: <u>10:30 pm</u>
Trip Supervisor: <u>John Smith</u>	Trip Supervisor Phone: _____
School: <u>Campobello Gramling School</u>	
Destination: <u>Landrum High School</u>	Destination Address: <u>18818 Asheville Highway Campobello SC 29322</u>
Loading Location: <u>Campobello Gramling School</u>	Loading Location Address: <u>250 Fagan Avenue Campobello SC 29322</u>
Drop-off Location: <u>Campobello Gramling School</u>	Drop-off Location Address: <u>250 Fagan Avenue Campobello SC 29322</u>
Vehicle Count: <u>2</u>	Account Code: <u>201-300-687-234-1234</u>
Number of Students: <u>65</u>	Other Funding: _____
Number of Special Ed. Students: <u>0</u>	Number of Adults: <u>12</u>
Multiple Bus: <input checked="" type="checkbox"/> <u>1</u> of <u>2</u> (Time and Mileage must match)	
Special Instructions:	
 Trip Notes:	
<u>Need bus with undercarriage for equipment</u>	

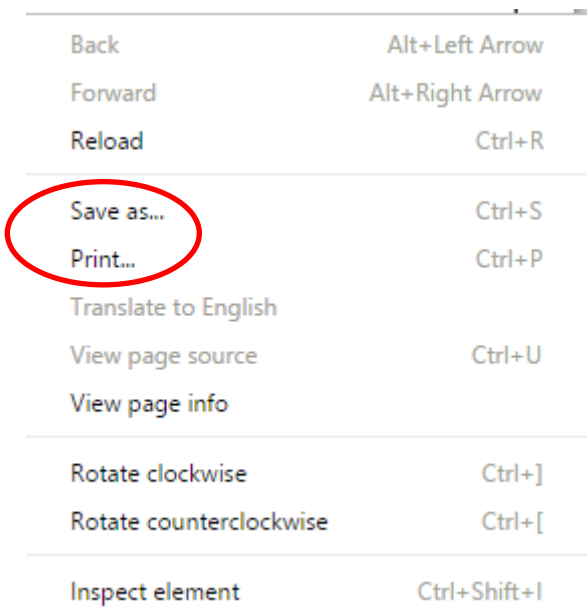
3. The bottom third of the 1st page has information to be completed by the driver at the time of the trip.

<i>To be Completed by Driver</i>		Permit #: 2322-1
Driver: <u>Allen, Klm</u>	Vehicle Number: <u>503-6395</u>	
Start Time: _____	End Time: _____	Total Time: _____
Start Odometer: _____	End Odometer: _____	Total Mileage: _____
Actual number of Students Transported: _____		
Driver's Signature: _____	Date: _____	
Trip Supervisor's Signature: _____	Date: _____	
Driver Notes/Comments: _____ _____		

The driver will fill out the actual times, which should include pre-trip, deadhead time, load time, trip time, post-trip. A drivers notes/comments line gives the driver an opportunity to report damage, reasons for times pre/post the expected or requested times and other situations.

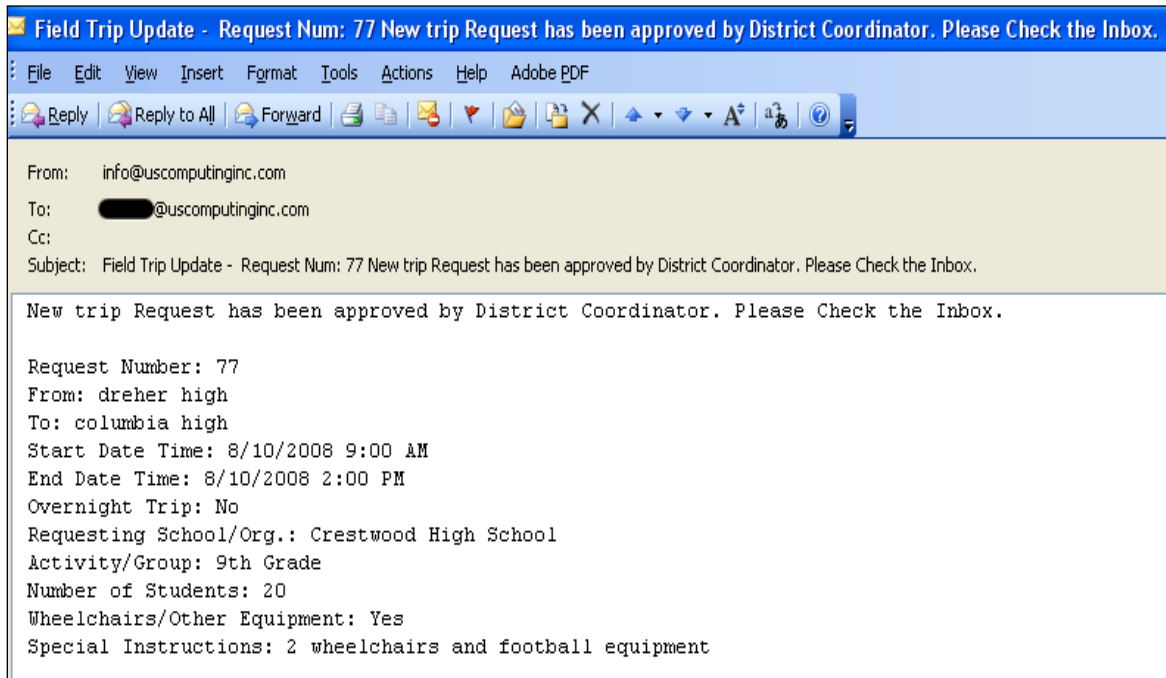


4. Print or save the document using the tools available or right click to open a dialog with options including save as and print.



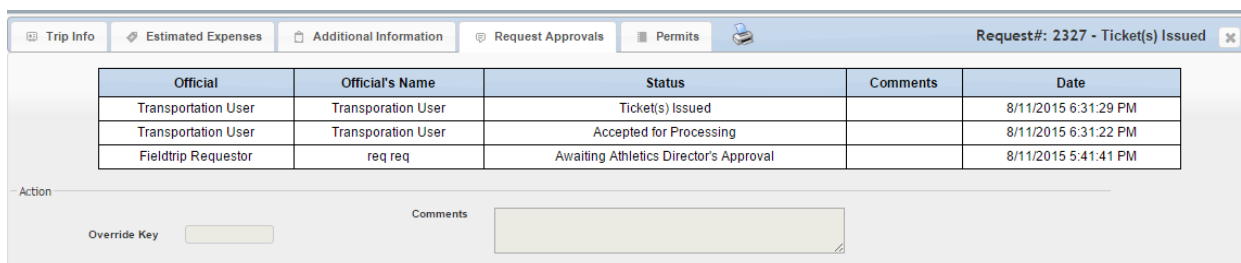
E-mail Alerts

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



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 and User are able to see details about each step in the progress of the trip in the system.



NOTE: Contact Seon Support for setup of the email notification process.

Billing

Following the completion of a trip, the driver will return the completed Field Trip Information Form showing hours, mileage, and any possible other costs associated with the trip such as damage to the vehicle, driver meals, tolls.

1. Open the trip from the Inbox by clicking on the Request #.

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	Ticket(s) Issued
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Ticket #
2312-2

2. Proceed to the Permit tab in the request. Click on the Ticket # to open the record.
3. Upon issuing the tickets, a new tab was added to the screen to prepare for the billing process. Click on

Mileage & Time to open the screen to enter information provided by the driver upon return from the trip.

Ticket #	Start Point	End Point	Vehicle	Driver	Bus Mobile #	Status	Print	Bidding	View/Edit	Delete	
2322-1	Campobello Gramling School	Campobello Gramling School	503-6395	Allen, KIm	555-555-5555	Ticket Issued					<input type="checkbox"/>
2322-2	Campobello Gramling School	Campobello Gramling School	11111	Bateman, Sharon		Ticket Issued					<input type="checkbox"/>

Ticket Details | Mileage & Time | Ticket Number: 2322-2 | Created By: Transporation User | Last Updated By: Transporation User

Add New Trip Mileage Item										
Mileage Information										
Trip Segment	Start Odometer	End Odometer	Total Mileage	Billing Units	Billing Rate	Cost	Invoice	Delete		
Entire Trip				Per Mile by Vehicle Owner	0.00	0.00	<input checked="" type="checkbox"/>			
				Per Mile by Vehicle Owner	0.00	0.00	<input checked="" type="checkbox"/>			
				Per Mile by Vehicle Owner	0.00	0.00	<input checked="" type="checkbox"/>			

Add New Trip Time Item										
Personnel/Time Information										
Trip Segment	Personnel	Start Date Time	End Date Time	Total Time	Overtime Hours	Billing Units	Billing Rate	Cost	Invoice	Delete
Entire Trip		08/28/2015 04:30 PM	08/28/2015 10:30 PM	6					<input checked="" type="checkbox"/>	
									<input checked="" type="checkbox"/>	
									<input checked="" type="checkbox"/>	

NOTE: If you have multiple tickets for a trip, you will complete this form for each ticket #.

Entering Mileage for Billing

4. There are multiple options for billing mileage. The User can bill the entire trip at once or break down the trip into the many parts a trip would have including deadhead to pickup students, mileage to destination, and so

forth.

Select your option. If you opt to break down the trip by stages, you will add extra lines to track the mileage for each stage. Use the “Add New Trip Mileage Item” to accomplish this.

5. Fill in the Start and End Odometer readings for the entire trip or each stage. The program will figure the total mileage.

6. Select the Billing Units. The Billing rate will autofill and figure the mileage cost.

Trip Segment	Start Odometer	End Odometer	Total Mileage	Billing Units	Billing Rate	Cost	Invoice	Delete
Entire Trip	135260	135372	112	Per Mile	2.77	310.24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				Per Mile by Vehicle Owner	0.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

NOTE: Billing rate may be updated in the Administration or manually on the screen during the billing process.

Enter Costs for Personnel

1. In the Personnel/Time Information area, the same options exist for breaking down the trip by stages/segments. Make your selection from the drop down in the Trip Segment field.

2. In the Personnel field, the field will be autofilled with the driver. If there was more than one assignment, click on the drop down to select the person for the first line. Click on “Add New Trip Time Item” for additional lines for other personnel.

Add New Trip Time Item Personnel

Trip Segment	Personnel
Entire Trip ▼	Bateman, Sharon ▼
▼	Bateman, Sharon
▼	Davis, Lorraine

3. If the driver reports different hours than what was on the trip request, and the district allows billing for all time rather than just trip time, the User can manually change the start and end times to reflect actual time the driver will be paid for and to be billed for the trip.

Start Date Time	End Date Time	Total Time
08/28/2015 04:30 PM	08/28/2015 10:30 PM	6

VS

Start Date Time	End Date Time	Total Time
08/28/2015 04:00 PM	08/28/2015 11:10 PM	7.17

The program will figure the hours down to 5 minute increments.

4. Choose the Billing Unit and corresponding Rate. Multiple options are available for billing units and billing rates.

Billing Units	Billing Rate	Cost
HOURLY_SALARY ▼	16.00	114.72
Daily		0.00
Hourly		0.00
Other		
HOURLY_SALARY		

The program will figure the cost.

5. When mileage and time have been added, click Process Billing. Upon completion of the save, a Success window will appear. Click OK.

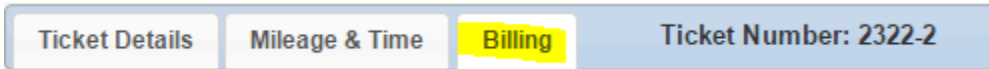
Save Billing - Success ✕

Billing information saved Successfully

Ok
Cancel

Review Billing/Add Other Costs

6. Another tab has been added to the Request to be able to complete the billing process.



7. The Billing screen shows a breakdown of all costs for the trip and account numbers for billing. There are also options to be able to add other costs for the trip such as damage/repairs, meals for the driver, or any other costs.

The screenshot shows the 'Billing Information' screen. At the top, there are tabs for 'Ticket Details', 'Mileage & Time', and 'Billing'. The 'Billing' tab is active. The screen displays the following information:

- Ticket Number: 2322-2
- Created By: Transportation User
- Last Updated By: Transportation User

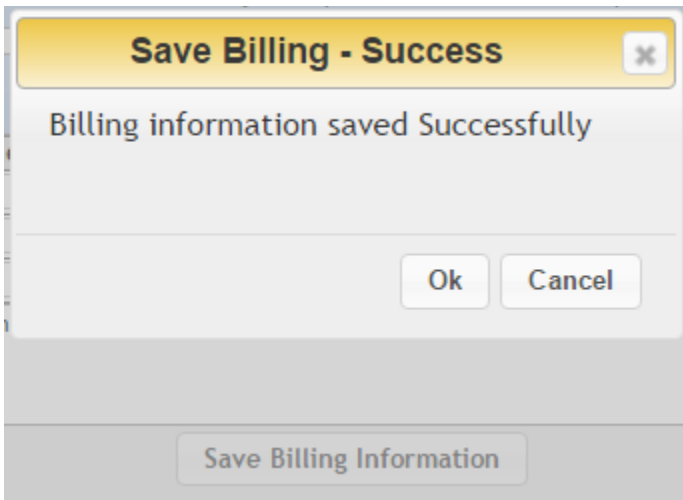
Below this information is a table with the following columns: Bill Item, Calc Amount, Payment Amount, Payment Method, Account, Bill To, and Delete. The table contains three rows of data:

Bill Item	Calc Amount	Payment Amount	Payment Method	Account	Bill To	Delete
Mileage	310.24	310.24	Fund Account	201-300-687-234-1234	Campobello Gramling Sci	X
Driver Pay	114.72	114.72	Fund Account	201-300-687-234-1234	Campobello Gramling Sci	X
Other	16.00	16.00	Fund Account	201-300-687-234-1234	Campobello Gramling Sci	X

Below the table, there is a 'Billing' dropdown menu with the following options: Compensation, Damages, Driver Pay, Food, Late Cancellation Fee, Lodging, Mileage, Monitor Pay, Other (highlighted), and Repairs. There are also two buttons: 'Save Billing Information' and 'Generate Invoice'.

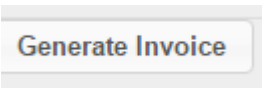
NOTE: The Bill Items are totally customizable to the needs of the User.

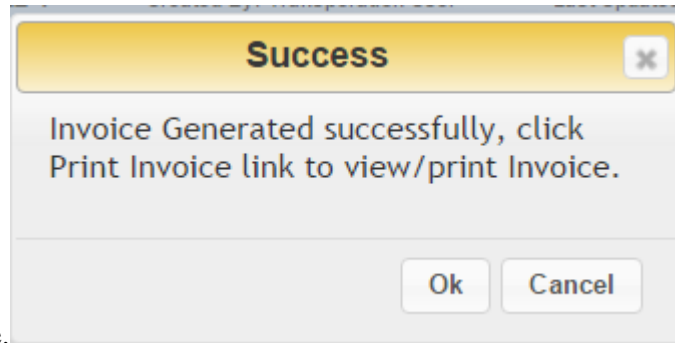
8. Save billing information when you have completed any edits you make for additional billing items. Click OK when the Success dialog opens.



The status will change.

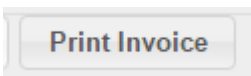
Generate Invoice & Print Invoice

Click on 



Click OK in the Success message.

The Status will change. 

Click on the  button to create an invoice which can either be printed or saved and emailed per district procedure.

Printed On: 08/25/2015

My School District Transportation Invoice

Request No.: 2322

Invoice No.: 104221

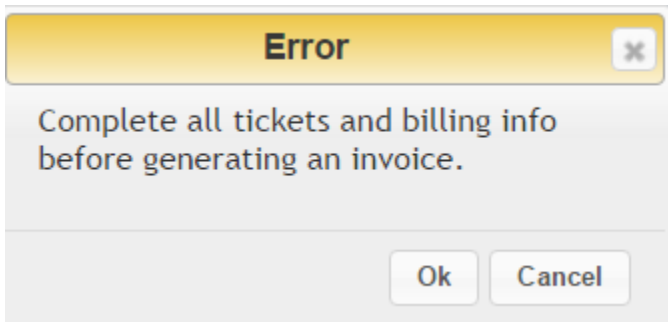
School/Organization: Campobello Gramling School	Contact: Transportation User
Date of Trip: 08/28/2015	Destination: Landrum High School
Activity/Group: Football - Varsity	

Ticket Number	Personnel Cost	Mileage Cost	Other Cost	Total Cost
2322-1 Allen, Klm				
Bill To				
Fund Account 201-300-687-234-1234				
Campobello Gramling School	\$129.06	\$310.24	\$0.00	\$439.30
2322-2 Bateman, Sharon				
Bill To				
Fund Account 201-300-687-234-1234				
Campobello Gramling School	\$114.72	\$310.24	\$139.63	\$564.59
Grand Totals:				
	\$243.78	\$620.48	\$139.63	\$1,003.89

* Other costs includes Admin. Fee, Cleanup Fee, Damages, Food, Fuel, Lodging, Monitor, Repairs and Other miscellaneous charges

Billing	Other costs: Repairs--cost to repair damage to next to the last seat on the left side of the bus \$50.00.
Comments	Monitor Pay--Lorraine Davis \$89.63.

NOTE: If you have multiple tickets on one Request, billing functions must be completed for all tickets before invoices may be generated.



Non-Billable Trips

If there is a trip which would be considered non-billable, the User may work through the entire process, adding mileage. DO NOT add billing units for driver time if it truly a non-billable trip. Mileage will be deleted by the program when the trip is saved as non-billable but the driver time will stay.

Add New Trip Mileage Item		Mileage Information									
Trip Segment	Start Odometer	End Odometer	Total Mileage	Billing Units	Billing Rate	Cost	Invoice	Delete			
Entire Trip	100	200	100	Per Mile	2.25	225.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
				Per Mile by Vehicle Owner	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
				Per Mile by Vehicle Owner	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

Add New Trip Time Item		Personnel/Time Information									
Trip Segment	Personnel	Start Date Time	End Date Time	Total Time	Overtime Hours	Billing Units	Billing Rate	Cost	Invoice	Delete	
Entire Trip	Bateman, Sharon	07/31/2015 03:00 AM	07/31/2015 08:00 PM	17	0		0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Bateman, Sharon								<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Bateman, Sharon								<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Non-Billable

Click on **Non-Billable**. The trip will save and any amount that was in the cost for mileage will be brought to a zero.

Start Odometer	End Odometer	Total Mileage	Billing Units	Billing Rate	Cost
100	200	100	Per Mile	2.25	0.00
			Per Mile by Vehicle Owner	0.00	0.00
			Per Mile by Vehicle Owner	0.00	0.00

Generate and print the invoice as usual. Invoice will look like this if printed or saved. (Notation added regarding costs of non-billable trip. This may be omitted.)

Printed On: 08/25/2015

My School District Transportation Invoice

Request No.: 2312

Invoice No.: 104281

School/Organization: Campobello Gramling School	Contact: req req
Date of Trip: 07/31/2015	Destination: Thomas Jefferson Classical Academy
Activity/Group: Academic	

Ticket Number	2312-2	Bateman, Sharon	Personnel Cost	Mileage Cost	Other Cost	Total Cost
Bill To	Fund Account 201-300-687-234-1234					
Campobello Gramling School			\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals:			\$0.00	\$0.00	\$0.00	\$0.00

* Other costs includes Admin. Fee, Cleanup Fee, Damages, Food, Fuel, Lodging, Monitor, Repairs and Other miscellaneous charges


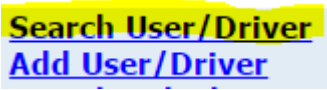
Billing	<u>Non-billable trip. Cost to transportation Mileage-\$225.00; Personnel cost \$272.00.</u>
Comments	


Reports

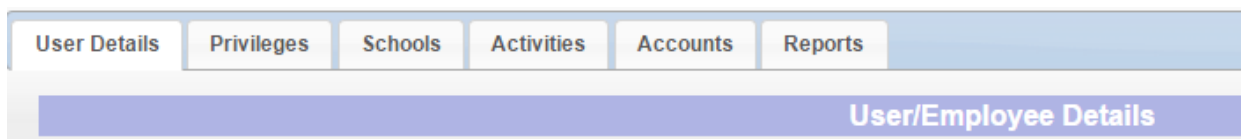
Report capabilities are available to all Field Trip users. Permissions can be set for individual users, a Requester for example, to create reports only selected reports for their activity and school. Permissions may be given to personnel in the athletics department regarding all schools but only the activities which are their responsibility.

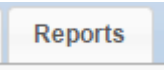
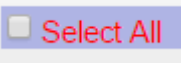
Setting up Permissions for Reports

Reporting permissions are set up for each individual Field Trip user in their own user record.

1. Click on  **Administration** to open the Administration
2. Click on  to open the User Management dialog box.
3. Search for the user or users by first or last name, school/organization, or user type such as Requester or Athletics Director. If you search by school/organization, you will get a list of everyone that has permissions or association with that school.

4. Find the user you want to make changes to and click the  for their record.
5. The record will open to their User/Employee Details with a row of tabs for different permissions. The tabs available will vary depending on the User's user type. For example, a driver will have a different row of tabs than a Principal or Requester.

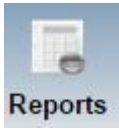


6. Click on the  tab to give permissions for the available reports. The User can give permissions for all report by clicking in the box to select all  or select only the specific reports that apply to that user and their area of responsibility.

7. When you have finished adding permissions on the user's record click .

Creating a Report

The User will create a report by selecting the various criteria needed to be shown in the report and a date range.



1. Click on the Reports icon to open the Reports dialog.

A screenshot of a web application dialog box titled "Reports". The dialog has a yellow header bar. Below the header, there is a section labeled "Schools:" containing a grid of 15 checkboxes, each followed by a school name. All checkboxes are checked. Below the grid is a link that says "Select All Schools" with a small red icon. Underneath the "Schools" section are several input fields: "Activity:" with a dropdown menu, "Start Date:" and "End Date:" with text boxes and calendar icons (showing 8/1/2015 and 8/31/2015), "Driver:" with a text box, "Location:" with a dropdown menu, "Vehicle Owner:" with a dropdown menu, "Vehicle Type:" with a dropdown menu, "Vehicle Number:" with a text box, and "Report Type:" with a dropdown menu. At the bottom left of the dialog is a blue button labeled "Generate Report".

2. Select the school or schools whose information is required in the report. Reports will open with all schools selected for which the User has permissions.

NOTE: Clicking on the **Select All Schools** to remove the check will also clear all of the checked schools so the User doesn't have to uncheck all schools to be able to select only one school. With no schools selected, the User may now check only the school whose information is required in the report.

3. Select a date range for the report by using the calendars in the start and end date fields.



A close-up of the "Start Date:" and "End Date:" fields from the Reports dialog. The "Start Date:" field contains the text "8/1/2015" and has a calendar icon to its right. The "End Date:" field contains the text "8/31/2015" and also has a calendar icon to its right.

4. Selecting information from the Activity, Location, Vehicle Owner, and Vehicle Type drop downs will let the system know what information needs to be included in the report.

NOTE: Selecting too many filters may narrow your data to the point where no information is available with all criteria selected.

5. If information is required regarding a specific driver, driver names in the system will be suggested by beginning to type the name of the driver.

Activity:

Start Date:  End Date: 


Driver:

Location:

Vehicle Owner:

Vehicle Type:


Vehicle Number:

Report Type: 

6. If information is required regarding a specific vehicle, vehicles with similar names/number will be suggested by beginning to type the number of the vehicle.

Vehicle Type:

Vehicle Number:

Report Type: 

7. Select the report for the Report Type field.

Activity:

Start Date:

Driver:

Location:

Vehicle Owner:

Vehicle Type:

Vehicle Number:

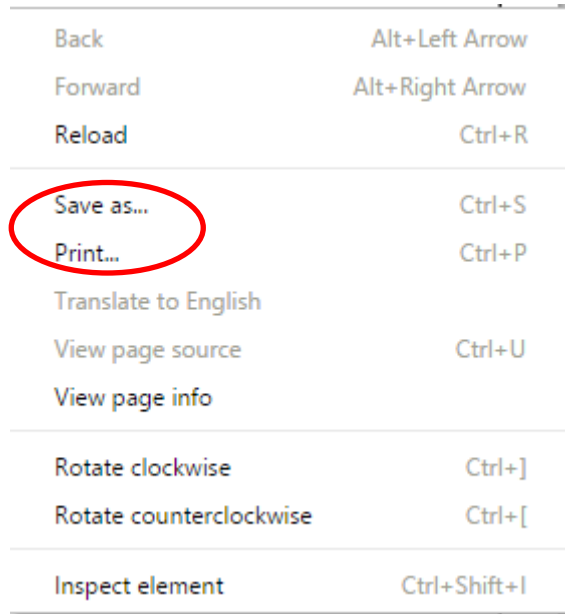
Report Type:

NOTE: See Example of reports in the “Examples” section of this document.

8. Click on . The Report will open in a new window.



9. Print or save the report by either clicking on



Or right click to open the menu.

Report Types

Reports available

Cost by Account

Report includes data by the billing Account Number/Fund Account or an alternate payer, such as the Booster Club, PTA, Rotary Club.

Report may be filtered by school, date range, activity or combination of these filters.

Printed On: 08/26/2015 1:39 pm

Date Range: 09/01/2014 - 06/30/2015

My School District

Cost By Account

Account Number	Personnel Cost	Mileage Cost	Other Cost	Total Cost
011102333	\$0.00	\$80.00	\$0.00	\$80.00
0123645888	\$98.70	\$0.00	\$16.00	\$114.70
1234356789011	\$112.50	\$209.88	\$0.00	\$322.38
201-300-687-234-1234	\$1,888.13	\$3,999.75	\$624.00	\$6,511.88
201-300-687-234-1235	\$0.00	\$0.00	\$0.00	\$0.00
34456677	\$0.00	\$0.00	\$50.00	\$50.00
457-788-455-757-4474	\$250.61	\$887.25	\$80.00	\$1,217.86
9876544	\$50.00	\$0.00	\$0.00	\$50.00
9877665	\$0.00	\$0.00	\$16.00	\$16.00
rotary club	\$105.00	\$225.50	\$16.00	\$346.50
Grand Totals:	\$2,504.94	\$5,402.38	\$818.00	\$8,725.32

Cost by Activity

Report provides a list of all activities with their field trip costs broken down by cost types.

Report data may be filtered by date, school, or activity. However, when filtering by activity, all activities will be listed but only the cost figures for the selected activity will be shown in the report.

Activity	Driver Cost	Mileage Cost	Other Cost	Total Amount
10th Grade	\$112.50	\$90.00	\$66.00	\$268.50
11th Grade	\$48.00	\$261.00	\$16.00	\$325.00
12th Grade	\$87.50	\$956.25	\$72.00	\$1,115.75
1st Grade	\$0.00	\$0.00	\$0.00	\$0.00
2nd Grade	\$0.00	\$0.00	\$0.00	\$0.00
3rd Grade	\$0.00	\$0.00	\$0.00	\$0.00
4th Grade	\$0.00	\$0.00	\$0.00	\$0.00
5th Grade	\$25.00	\$148.50	\$32.00	\$205.50
6th Grade	\$0.00	\$0.00	\$0.00	\$0.00
7th Grade	\$0.00	\$0.00	\$0.00	\$0.00
8th Grade	\$0.00	\$0.00	\$0.00	\$0.00
9th Grade	\$132.11	\$52.50	\$16.00	\$200.61
Academic	\$1,528.13	\$2,910.50	\$367.00	\$4,805.63
Afterschool Program	\$98.70	\$119.88	\$16.00	\$234.58
Air Force JROTC	\$0.00	\$0.00	\$0.00	\$0.00
Ambassadors	\$0.00	\$80.00	\$0.00	\$80.00
Army JROTC	\$0.00	\$0.00	\$0.00	\$0.00
Band	\$168.75	\$315.00	\$201.00	\$684.75
Baseball	\$0.00	\$0.00	\$0.00	\$0.00
Basketball	\$128.00	\$83.75	\$16.00	\$227.75

Driver Listing

Report provides a list of personnel in the application and the contracts/positions they hold, their hourly pay, beginning and ending date of the contract and the hours worked per week, and any certifications listed in their record with expiration dates.

Report data may be filtered by a single employee or the entire list, by a location, date range, employee type, or certification.

NOTE: For a driver to be assigned to a trip, they must have a contract in their employee record.

My School District

Employee Listing

08/27/2015

Last Name, First Name	Emp ID	Job	Certification(s)
Allen, Kim	000-00-6891	Volunteer, Pay/hr 10, Jan 1, Jan 1, hrs/week 40, Activity Driver, Pay/hr 10, Jan 1, Jan 1, hrs/week 40	Physical, Expires: 06/13/2013
Arnett, Bucky	000-00-5353	Regular Bus Driver, Pay/hr 18, Aug 25, Jun 22, hrs/week, Activity Driver, Pay/hr 15, Jan 1, Jul 23, hrs/week	
Atkins, Kathy	000-00-0547	Regular Bus Driver, Pay/hr 15, Sep 2, Jun 22, hrs/week 32	
Austin, Lisa	000-00-1946	Regular Bus Driver, Pay/hr 17, Sep 2, Jun 19, hrs/week 33, Regular Bus Driver, Pay/hr 17, Sep 2, Jun 19, hrs/week 33, Activity Driver, Pay/hr 14, Jan 1, Aug 25, hrs/week	10 Hour Advanced Course, Expires: 11/12/2014
Ball, Ray	000-00-0504	Regular Bus Driver, Pay/hr 17, Jan 1, Nov 29, hrs/week, Regular Bus Driver, Pay/hr 18, Sep 2, Jun 23, hrs/week 32, Activity Driver, Pay/hr 18, Sep 2, Jun 23, hrs/week 8	Car Seat Training, Expires: 01/13/2015, 10 Hour Advanced Course, Expires: 07/17/2014, Physical, Expires: 11/07/2013, DS875 X&Y, Expires: 02/03/2014
Bateman, Sharon	000-00-2850	Activity Driver, Pay/hr 17, Jan 1, Jan 6, hrs/week	
Benfield, Toni	000-00-7881	Regular Bus Driver, Pay/hr 17, Sep 2, Jun 22, hrs/week 32, Activity Driver, Pay/hr 17, Aug 25, Jun 22, hrs/week 34	
Bollinger, Dawn	000-00-6181	Regular Bus Driver, Pay/hr 18, Sep 2, Jun 22, hrs/week 38	
Booker, Van	000-00-5251	Activity Driver, Pay/hr 16, Jan 1, Mar 24, hrs/week, Activity Driver, Pay/hr 15, Oct 10, Jun 23, hrs/week 20	
Brice, Deon	000-00-5941	Coach, Pay/hr 18, Jan 1, May 15, hrs/week, Activity Driver, Pay/hr 15, Jun 22, Jun 23, hrs/week 20	

Driver Salary Time Log

Report presents a listing of the field trips driven by a driver for a period of time.

The report may be filtered by date, school, location/depot, all drivers or by single driver or combination of filters. If no driver is specified, the report will be produced with a single page for every driver with the filters included for the report.

Print Date: 08/27/2015

Selected Date Range: 8/1/2015 - 8/31/2015

My School District

Field Trip Driver Salary Time Log

Driver: Bucky Arnett		Driver ID: 000-00-5353									
Date	School	Permit	Account Code	Rate	Total Time	Regular Hours	Regular Pay	Over Time	OverTime Pay	Total Pay	
08/19/2015	Campobello Gramling School	2317-1	201-300-687-234-1234	12.50	4.00	4.00	\$44.00	0.00	\$0.00	\$44.00	
08/20/2015	Campobello Gramling School	2318-1	201-300-687-234-1234	12.50	5.25	5.25	\$65.63	0.00	\$0.00	\$65.63	
Grand Totals:					9.25	9.25	\$109.63	0.00	\$0.00	\$109.63	
I CERTIFY THAT THE ABOVE ACCURATELY REFLECTS THE DATES AND HOURS OF FIELD TRIPS I HAVE DRIVEN THIS PAY PERIOD											
_____ Transportation Official Signature					_____ Driver Signature						

Driver Time

Report is a listing of drivers and trips completed including start and end times, total hours and driver costs with a total by employee.

Report may be filtered by date, school, single driver or all drivers, activity, location/depot or any combination of filters required.

My School District
Field Trip Driver Time

Driver Name	Driver ID	Request	Permit	School	Activity	Destination	Start Date Time	End Date Time	Total Hours	Driver Cost
Bucky Arnett	000-00-5353	2317	2317-1	Campobello Gramling School	Band	Chapman Cultural Center	8/19/15 8:30 am	8/19/15 9:30 am	4.00	44.00
		2318	2318-1	Campobello Gramling School	Band	Landrum High School	8/20/15 8:30 am	8/20/15 1:45 pm	5.25	65.63
Bucky Arnett Driver Totals:									9.25	109.63
Kim Allen	000-00-6891	2322	2322-1	Campobello Gramling School	Football - Varsity	Landrum High School	8/28/15 4:00 pm	8/28/15 11:10 pm	7.17	129.06
		Kim Allen Driver Totals:								
Sharon Bateman	000-00-2850	2322	2322-2	Campobello Gramling School	Football - Varsity	Landrum High School	8/28/15 4:00 pm	8/28/15 11:10 pm	7.17	114.72
		Sharon Bateman Driver Totals:								
Grand Total:									353.41	

Trip Calendar

Report has a list of all trips by date with trip details, assigned vehicle and driver.

Report may be filtered by date, school, activity, single driver or location/depot or combination of filters.

Example: Varsity Football would show the entire schedule that has been entered with the details for each scheduled game..

TRIP CALENDAR

SCHOOL YEAR: _____

Trip Date and Time	Bus No.	Driver	Origin	Destination	Group	Total	Request No.	Permit No.
Monday, August 10, 2015 08/10/2015 - 08/10/2015 2:00 pm - 7:00 pm	111000	Sharon Bateman	Campobello Gramling School	Spartanburg Youth Theater	12th Grade	24	2316	
Wednesday, August 19, 2015 08/19/2015 - 08/19/2015 8:30 am - 1:30 pm	2	Bucky Arnett	Campobello Gramling School	Chapman Cultural Center	Band	35	2317	2317-1
Thursday, August 20, 2015 08/20/2015 - 08/20/2015 9:00 am - 1:00 pm	2	Bucky Arnett	Campobello Gramling School	Landrum High School	Band	42	2318	2318-1
Thursday, August 27, 2015 08/27/2015 - 08/27/2015 7:40 am - 2:40 pm	503-6955	Sharon Bateman	Campobello Gramling School	Blue Ridge High School	Baseball	43	2327	2327-1
Friday, August 28, 2015 08/28/2015 - 08/28/2015 4:30 pm - 10:30 pm	503-6395	Kim Allen	Campobello Gramling School	Landrum High School	Football - Varsity	77	2322	2322-1
08/28/2015 - 08/28/2015 4:30 pm - 10:30 pm	11111	Sharon Bateman	Campobello Gramling School	Landrum High School	Football - Varsity	77	2322	2322-2
Monday, August 31, 2015 08/31/2015 - 08/31/2015 9:00 am - 1:30 pm	2	Bucky Arnett	Campobello Gramling School	Landrum High School	Band	38	2326	2326-1

Trip Calendar by Driver

Report displays a list of trips by driver, by date with all the details regarding the trip.

Report may be filtered by activity, school, date range or combination of filters.

Printed On: 08/27/2015 10:57 am
Date Range: 08/01/2015 - 08/31/2015

TRIP CALENDAR
SCHOOL YEAR: _____

Trip Date and Time	Bus No.	Driver	Origin	Destination	Group	Total	Request No.	Permit No.
Bucky Arnett								
8/16/2015 08/19/2015 - 08/19/2015 8:30 am - 1:30 pm	2	Bucky Arnett	Campobello Gramling School	Chapman Cultural Center	Band	35	2317	2317-1
08/20/2015 - 08/20/2015 9:00 am - 1:00 pm	2	Bucky Arnett	Campobello Gramling School	Landrum High School	Band	42	2318	2318-1
8/30/2015 08/31/2015 - 08/31/2015 9:00 am - 1:30 pm	2	Bucky Arnett	Campobello Gramling School	Landrum High School	Band	38	2326	2326-1
Kim Allen								
8/23/2015 08/28/2015 - 08/28/2015 4:30 pm - 10:30 pm	503-6395	Kim Allen	Campobello Gramling School	Landrum High School	Football - Varsity	77	2322	2322-1
Sharon Bateman								
8/9/2015 08/10/2015 - 08/10/2015 2:00 pm - 7:00 pm	111000	Sharon Bateman	Campobello Gramling School	Spartanburg Youth Theater	12th Grade	24	2316	
8/23/2015 08/27/2015 - 08/27/2015 7:40 am - 2:40 pm	503-6955	Sharon Bateman	Campobello Gramling School	Blue Ridge High School	Baseball	43	2327	2327-1
08/28/2015 - 08/28/2015 4:30 pm - 10:30 pm	11111	Sharon Bateman	Campobello Gramling School	Landrum High School	Football - Varsity	77	2322	2322-2

Trip Charges

Report gives a list of trips and a breakdown of the charges and a total cost for each trip.

Report may be filtered by date range, school, activity or combination of filters.

Printed On: 08/27/2015 11:02 am
Date Range: 01/01/2015 - 08/31/2015

My School District
TRIP CHARGES

Customer	Request No. Permit No.	Start Date	Activity	Destination	Vehicle Number	Driver Cost	Mileage Cost	Other Costs	Total
A Moby Dick High	2271 2271-1	02/10/2015	Afterschool Program	Barnes & Noble	503-639 3	\$98.70	\$119.88	\$16.00	\$234.58
Totals for request num: 2,271						\$98.70	\$119.88	\$16.00	\$234.58
Totals for school: A Moby Dick High						\$98.70	\$119.88	\$16.00	\$234.58
Campobello Gramling School	2269 2269-1	01/30/2015	Academic	Chesnee High School	503-725 7	\$87.50	\$135.00	\$16.00	\$238.50
Totals for request num: 2,269						\$87.50	\$135.00	\$16.00	\$238.50
2274	2274-1	02/27/2015	Academic	Westside High School	507-031 7	\$87.50	\$270.00	\$16.00	\$373.50
Totals for request num: 2,274						\$87.50	\$270.00	\$16.00	\$373.50
2281	2281-2	04/01/2015	Academic	Brooks Center Performing Arts	111000	\$233.75	\$405.00	\$16.00	\$654.75
Totals for request num: 2,281						\$233.75	\$405.00	\$16.00	\$654.75

Trip Summary

Report may include all trips or filtered by date range, school, activity, assigned bus, assigned driver, vehicle type, location/depot of vehicle used or combination of filters.

My School District

Printed On: 08/26/2015

Selected Date Range: 11/1/2014 -- 6/30/2015

Total Trips Summary

School	Total Trips	Total Vehicles	Total Mileage	Total Passengers	Driver Time	Driver Cost	Mileage Cost	Other Cost	Total Cost
A Moby Dick High	1	1	68.50	17	6.58	\$98.70	\$119.88	\$16.00	\$234.58
Campobello Gramling School	1	1	100.00	31	5.00	\$90.00	\$175.00	\$16.00	\$281.00
Campobello Gramling School	1	1	40.00	22	9.00	\$112.50	\$90.00	\$66.00	\$268.50
Campobello Gramling School	1	1	30.00	26	4.83	\$132.11	\$52.50	\$16.00	\$200.61
Campobello Gramling School	1	1	100.00	14	7.00	\$164.50	\$225.00	\$16.00	\$405.50
Campobello Gramling School	1	1	60.00	29	7.00	\$87.50	\$135.00	\$16.00	\$238.50
Campobello Gramling School	1	1	120.00	35	7.00	\$87.50	\$270.00	\$16.00	\$373.50
Campobello Gramling School	1	1	180.00	39	8.50	\$233.75	\$405.00	\$16.00	\$654.75
Campobello Gramling School	1	1	100.00	34	6.00	\$75.00	\$225.00	\$16.00	\$316.00
Campobello Gramling School	1	1	40.00	42	3.75	\$0.00	\$0.00	\$100.00	\$100.00
Campobello Gramling School	1	1	40.00	28	4.50	\$56.25	\$90.00	\$16.00	\$162.25
Campobello Gramling School	1	1	50.00	27	5.25	\$65.63	\$112.50	\$16.00	\$194.13
Campobello Gramling School	1	1	50.00	31	5.25	\$0.00	\$0.00	\$16.00	\$16.00
Campobello Gramling School	1	1	50.00	33	6.00	\$75.00	\$112.50	\$100.00	\$287.50
Campobello Gramling School	1	1	80.00	32	5.50	\$68.75	\$180.00	\$75.00	\$323.75
Campobello Gramling School	1	1	100.00	38	9.00	\$112.50	\$225.00	\$35.00	\$372.50
Campobello Gramling School	1	1	40.00	37	2.00	\$25.00	\$90.00	\$50.00	\$165.00
Campobello Gramling School	1	1	200.00	42	7.00	\$87.50	\$450.00	\$56.00	\$593.50
Campobello Gramling School	2	2	66.00	53	2.00	\$25.00	\$148.50	\$32.00	\$205.50
Chapman High School	1	1	82.00	40	5.25	\$105.00	\$225.50	\$16.00	\$346.50
Chapman High School	1	1	15.00	33	2.50	\$31.25	\$0.00	\$16.00	\$47.25
Chapman High School	1	1	30.00	32	5.25	\$89.25	\$67.50	\$16.00	\$172.75
Chapman High School	1	1	116.00	24	3.00	\$48.00	\$261.00	\$16.00	\$325.00
Chapman High School	1	1	225.00	36	4.00	\$0.00	\$506.25	\$16.00	\$522.25
Inman Elem School	1	0	250.00	53	12.00	\$330.00	\$687.50	\$16.00	\$1,033.50
Totals:	26	25	2,232.50	881	143.16	\$2,200.69	\$4,853.63	\$786.00	\$7,840.32

Trip Summary by Driver

Report by driver includes a summary of all trips by drivers. Report may be filtered by date range, location/depot, vehicle owner, activity, school, or vehicle.

Printed On: 08/26/2015

My School District

Selected Date Range: 9/1/2014 -6/30/201

Field Trips by Drivers

Driver Name	Total Trips	Total Hours	Total Mileage	Total Driver Cost
Aubrey Stewart	1	5.50	80.00	\$68.75
Bucky Arnett	6	37.25	645.00	\$712.50
Dana Owens	2	9.58	184.50	\$146.70
Dennis Brown	1	4.83	30.00	\$132.11
Deon Brice	2	6.25	55.00	\$31.25
Josh Fowler	1	5.25	50.00	\$65.63
Kathy Atkins	1	7.00	100.00	\$164.50
Lisa Austin	4	23.50	465.00	\$243.75
Sharon Bateman	4	23.25	170.00	\$342.25
Steven Fusaro	1	6.00	50.00	\$75.00
Student <15 71 pass First	2	13.75	230.00	\$233.75
Student extra time First	1	7.00	200.00	\$87.50
Van Booker	1	2.00	40.00	\$25.00
Grand Totals:	27	151.16	2,299.50	\$2,328.69

Trip Request Summary

Trip by Request Summary includes all information regarding each trip submitted. Report may be filtered by activity, school, date, location/depot, vehicle, driver, owner of vehicle or combination of filters.

Printed On: 8/26/2015

Field Trip Request Summary

Selected Date Range:

Request #	Permit #	Start Date Time	End Date Time	School	Origin	Destination	Activity	Children	Adults	Vehicle	Driver Name	Status
Total Time	Driver Cost	Total Mileage	Mileage Cost	Total Cost	Late Fee	Cancellation Fe	Other Fee	Invoice Date	Payment Date			
2264	2264-1	1/12/15 9:00 am	1/12/15 1:30 pm	Chapman High School		Campobello Gramling	Band	30		3603-6393	Deon Brice	
2.50	31.25	15.00	0.00	47.25	0.00	0.00	16.00	12/03/2014	12/03/2014			
2268	2268-1	1/19/15 8:30 am	1/19/15 1:45 pm	Chapman High School		Landrum High School	Academic	30		2603-6393	Sharon Bateman	
5.25	89.25	30.00	67.50	172.75	0.00	0.00	16.00	12/17/2014	12/17/2014			
2265	2265-1	1/20/15 8:10 am	1/20/15 2:10 pm	Chapman High School		Campobello Gramling	Band	30		325	Bucky Arnett	
6.00	165.00	50.00	112.50	293.50	0.00	0.00	16.00	12/22/2014	01/23/2015			
2269	2269-1	1/30/15 9:10 am	1/30/15 4:10 pm	Campobello Gramling Schoc		Chesnee High School	Academic	25		4603-7257	Bucky Arnett	
7.00	87.50	60.00	135.00	238.50	0.00	0.00	16.00	01/07/2015	01/07/2015			
2270	2270-1	2/9/15 9:35 am	2/9/15 4:35 pm	Campobello Gramling Schoc		BMW Manufacturing Plant	Academic	25		3603-6393	Bucky Arnett	
7.00	87.50	100.00	225.00	328.50	0.00	0.00	16.00	01/08/2015	01/23/2015			
2271	2271-1	2/10/15 12:40 pm	2/10/15 6:55 pm	A Moby Dick High		Barnes & Noble	Afterschool Pro	15		2603-6393	Dana Owens	
6.58	98.70	68.50	119.88	234.58	0.00	0.00	16.00	01/28/2015	01/23/2015			

Trip Request Summary (excel)

Trip by Request Summary (excel only) includes all information regarding each trip submitted. Report may be filtered by activity, school, date, location/depot, vehicle, driver, owner of vehicle or combination of filters.

The report is produced and a link is provided immediately on the screen to the spreadsheet where all data associated with every request is available.

	A	B	C	D	E	F	G	H
1	Request #	Permit #	School Name	Start Date	End Date	Activity Desc	Destination	Students
2	2264	2264-1	Chapman High School	1/12/2015 9:00	1/12/2015 13:30	Band	Campobello Gramling	30
3	2268	2268-1	Chapman High School	1/19/2015 8:30	1/19/2015 13:45	Academic	Landrum High School	30
4	2265	2265-1	Chapman High School	1/20/2015 8:10	1/20/2015 14:10	Band	Campobello Gramling	30
5	2269	2269-1	Campobello Gramling School	1/30/2015 9:10	1/30/2015 16:10	Academic	Chesnee High School	25
6	2270	2270-1	Campobello Gramling School	2/9/2015 9:35	2/9/2015 16:35	Academic	BMW Manufacturing Plant	25
7	2271	2271-1	A Moby Dick High	2/10/2015 12:40	2/10/2015 18:55	Afterschool Program	Barnes & Noble	15
8	2273	2273-1	Chapman High School	2/25/2015 13:00	2/25/2015 16:00	11th Grade	Barnes & Noble	20
9	2275	2275-1	Chapman High School	2/27/2015 13:00	2/27/2015 17:00	12th Grade	Barnes & Noble	30
10	2274	2274-1	Campobello Gramling School	2/27/2015 9:00	2/27/2015 16:00	Academic	Westside High School	30
11	2277	2277-1	Campobello Gramling School	3/23/2015 8:40	3/23/2015 16:05	Academic	Chapman Cultural Center	23
12	2279	2279-1	Campobello Gramling School	3/26/2015 9:00	3/26/2015 13:30	Academic	Holly Springs Motlow Elem School	35
13	2281	2281-2	Campobello Gramling School	4/1/2015 8:00	4/1/2015 16:30	Academic	Brooks Center Performing Arts	35

Trip Summary by Month

Report breaks down the trips by month showing key information for each trip during each month and providing monthly totals, a calendar year total, and a grand total.

Report may be filtered by date range, school, activity or a combination of filters.

NOTE: If two years are covered, a yearly total will be shown following the last month with entries for each year and a grand total for the report at the end.

My School District

Printed On: 08/27/2015

Selected Date Range: 1/1/2015 -- 8/31/2015

Trips Summary by Month

Year	Month	School	Total Trips	Total Vehicles	Total Passengers	Total Mileage	Total Time	Driver Cost	Mileage Cost	Other Cost	Total Cost
2015	Jan	Campobello Gramling Schoo	1	1	29.00	60.00	7.00	\$87.50	\$135.00	\$16.00	\$238.50
	Jan	Chapman High School	2	2	65.00	45.00	7.75	\$120.50	\$67.50	\$32.00	\$220.00
	Monthly Total:		3	3	94.00	105.00	14.75	\$208.00	\$202.50	\$48.00	\$458.50
	Feb	A Moby Dick High	1	1	17.00	68.50	6.58	\$98.70	\$119.88	\$16.00	\$234.58
	Feb	Campobello Gramling Schoo	1	1	35.00	120.00	7.00	\$87.50	\$270.00	\$16.00	\$373.50
	Feb	Chapman High School	2	2	60.00	341.00	7.00	\$48.00	\$767.25	\$32.00	\$847.25
	Monthly Total:		4	4	112.00	529.50	20.58	\$234.20	\$1,157.13	\$64.00	\$1,455.33
	Apr	Campobello Gramling Schoo	8	8	266.00	590.00	44.75	\$574.38	\$1,125.00	\$355.00	\$2,054.38
	Monthly Total:		8	8	266.00	590.00	44.75	\$574.38	\$1,125.00	\$355.00	\$2,054.38
	Jun	Campobello Gramling Schoo	4	5	223.00	406.00	20.00	\$250.00	\$913.50	\$173.00	\$1,336.50
	Monthly Total:		4	5	223.00	406.00	20.00	\$250.00	\$913.50	\$173.00	\$1,336.50
	Jul	Campobello Gramling Schoo	5	6	209.00	890.00	66.17	\$614.63	\$1,777.50	\$148.00	\$2,540.13
	Monthly Total:		5	6	209.00	890.00	66.17	\$614.63	\$1,777.50	\$148.00	\$2,540.13
	Aug	Campobello Gramling Schoo	3	4	231.00	284.00	23.59	\$353.41	\$767.98	\$239.63	\$1,361.02
	Monthly Total:		3	4	231.00	284.00	23.59	\$353.41	\$767.98	\$239.63	\$1,361.02
	Yearly Total:		27	30	135.00	2,804.50	189.84	\$2,234.62	\$5,943.61	\$1,027.63	\$9,205.86
	Grand Total:		27	30	135.00	2,804.50	189.84	\$2,234.62	\$5,943.61	\$1,027.63	\$9,205.86

Vehicle Listing

Report provides a list of all vehicles accounted for in the Field Trip application and any maintenance information that is maintained in the system.

Report may be filtered by location/depot, owner, type or combination of filters.

My School District

Vehicle Listing

08/27/2015

Vehicle Number	Capacity	Status	Vehicle Type	Vehicle Owner	Location	Start Mileage	End Mileage	Last Service Date	Mileage Since
2	78	Active	Regular Bus	District Owned	Transportation Office	10010	100400	07/01/2015	90300
11111	63/84	Active	Special Needs Bus	District Owned	Transportation Office	10000	135372		
111000		Active	Regular Bus	District Owned	Main Depot	100	10182		
123-56		Active	Special Needs Bus	District Owned	Main Depot				
503-6393	54	Active	Regular Bus	State Owned	Transportation Office	9100	125033	06/09/2015	33
503-6395	54	Active	Regular Bus	State Owned	Transportation Office	9100	100055		
503-6479	54	Active	Regular Bus	State Owned	Garage 1	120	10050	03/09/2015	50
503-6955	60	Active	Regular Bus	State Owned	Landrum High School			05/28/2015	0
503-7257	62	Active	Regular Bus	State Owned	Landrum High School	10000	10060	03/09/2015	0
503-7346	60	Active	Regular Bus	State Owned	Chapman High School				

Vehicle Mileage

Report lists use of vehicles in fleet showing trips, dates, number of mileages and mileage costs per vehicle.

Report may be filtered by single vehicle or all vehicles, date range, location/depot, school, vehicle owner and activity or combination of filters.

My School District

Printed On: 8/27/2015

Selected Date Range: 9/1/2014 -- 8/31/2015

My School District

School	Vehicle:	Permit #	Start Date	Destination	Vehicle	Miles	Mileage Cost
A Moby Dick High	503-6393	2271-1	02/10/2015	Barnes & Noble	503-6393	68.50	\$119.88
Vehicle Totals:	1					68.50	\$119.88
School Totals:	1	A Moby Dick High				68.50	\$119.88
Campobello Gramling School	10101	2253-1	12/14/2014	Kerry's Zoo	10101	40.00	\$90.00
Vehicle Totals:	1					40.00	\$90.00
111000		2281-2	04/01/2015	Brooks Center Performing Arts	111000	180.00	\$405.00
		2288-1	04/08/2015	Barnes & Noble	111000	100.00	\$225.00
		2291-1	04/30/2015	Blacksburg Middle School	111000	50.00	\$112.50
		2312-2	07/31/2015	Thomas Jefferson Classical Academy	111000	100.00	\$0.00
Vehicle Totals:	4					430.00	\$742.50
11111		2292-1	04/30/2015	Blacksburg High School	11111	50.00	\$0.00
		2302-1	06/22/2015	BMW Manufacturing Plant	11111	200.00	\$450.00
		2304-2	07/21/2015	BMW Manufacturing Plant	11111	200.00	\$450.00
		2322-2	08/28/2015	Landrum High School	11111	112.00	\$310.24
Vehicle Totals:	4					562.00	\$1,210.24

Voucher

Printed On: 8/27/2015
 Selected Date Range: 9/1/2014 -- 8/31/2015

My School District Field Trip Voucher

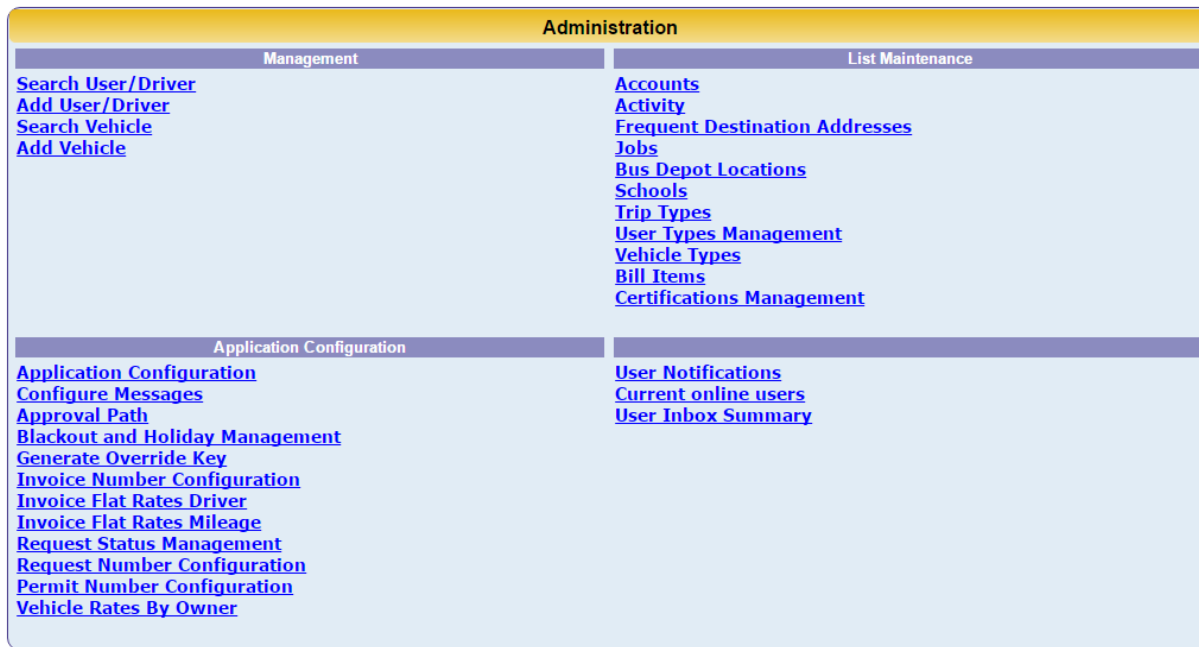
Start Date	Bill To	Requestor	Permit #	Destination	Total Hours	Total Driver Cost (\$)	Miles	Mileage Cost (\$)	Other Cost(\$)	Account Number	Total Due for Permit(\$)	% to be Charged	Total Due for Account(\$)
10/07/2014	Holly Springs Motlow Elem School	Transporation User	2233-1	Holly Springs Motlow Elem School 325	8.00	128.00	67.00	83.75	16.00	201-300-687-234-1234	227.75	100.00	227.75
11/25/2014	Inman Elem School	req req	2241-1	Inman Elem School 25 Oakland Avenue	12.00	330.00	250.00	687.50	16.00	201-300-687-234-1234	1,033.50	100.00	1,033.50
11/14/2014	Campobello Gramling School	req req	2246-1	Campobello Gramling School 250 Fagan	5.00	90.00	100.00	175.00	16.00	201-300-687-234-1234	281.00	100.00	281.00
12/14/2014	Campobello Gramling School	req req	2253-1	Campobello Gramling School 250 Fagan	9.00	112.50	40.00	90.00	66.00	1234356789011	268.50	75.42	202.50
12/14/2014	Campobello Gramling School	req req	2253-1	Campobello Gramling School 250 Fagan	9.00	112.50	40.00	90.00	66.00	34456677	268.50	18.62	50.00
12/14/2014	Campobello Gramling School	req req	2253-1	Campobello Gramling School 250 Fagan	9.00	112.50	40.00	90.00	66.00	9877665	268.50	5.96	16.00
11/28/2014	Campobello Gramling School	req req	2257-1	Campobello Gramling School 250 Fagan	4.83	132.11	30.00	52.50	16.00	457-788-455-757-4474	200.61	75.08	150.61
11/28/2014	Campobello Gramling School	req req	2257-1	Campobello Gramling School 250 Fagan	4.83	132.11	30.00	52.50	16.00	9876544	200.61	24.92	50.00
12/19/2014	Chapman High School	req req	2262-1	Chapman High School 1420 Compton Bridge	5.25	105.00	82.00	225.50	16.00	rotary club	346.50	100.00	346.50

Administration

The Transportation User/Administrator has access to all permissions in Field Trip. All of the administration



functions are found by clicking on the **Administration** icon to open the Administration page.



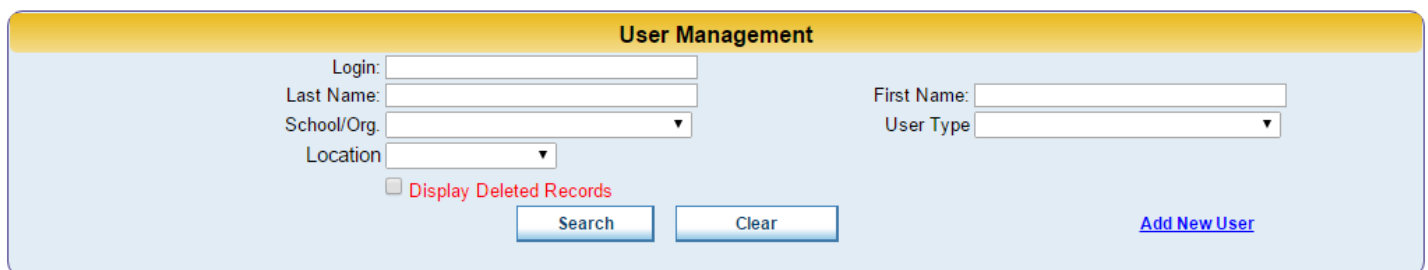
The screenshot shows the Administration page with a yellow header and a light blue background. It is divided into four main sections:

- Management**: Search User/Driver, Add User/Driver, Search Vehicle, Add Vehicle
- List Maintenance**: Accounts, Activity, Frequent Destination Addresses, Jobs, Bus Depot Locations, Schools, Trip Types, User Types Management, Vehicle Types, Bill Items, Certifications Management
- Application Configuration**: Application Configuration, Configure Messages, Approval Path, Blackout and Holiday Management, Generate Override Key, Invoice Number Configuration, Invoice Flat Rates Driver, Invoice Flat Rates Mileage, Request Status Management, Request Number Configuration, Permit Number Configuration, Vehicle Rates By Owner
- User Notifications**: User Notifications, Current online users, User Inbox Summary

Management

Search User/Driver

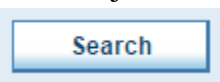
1. Click on Search User/Driver and the User Management window opens.



The screenshot shows the User Management search form with the following fields and controls:

- Login:
- Last Name:
- First Name:
- School/Org.:
- User Type:
- Location:
- Display Deleted Records
- Search:
- Clear:
- Add New User: [Add New User](#)

2. Enter just a few letters into any field or select a search filter from a field with a drop down and click



to locate the record of any current user in Field Trip.

NOTE: If your search doesn't return the array of data you expected, clear your filters and broaden your search.

3. The screen will refresh with the requested data including the number of records in the search, login, name, schools associated with the users, the type of user. At the far right of each line are tools to edit, copy or delete each individual record.

User Management

Login:
 Last Name:
 School/Org:
 Location:
 Display Deleted Records

First Name:
 User Type:

[Add New User](#)

Total No. of records: 42

Login	Last Name	First Name	School(s)	User Type	Status	Edit	Copy	Delete
RayB	Ball	Ray		Driver	Active			
SharonB	Bateman	Sharon		Driver	Active			
batsona	Batson	Alison	Campobello Gramling School, Chapman High School, District Office, Holly Springs Motlow Elem School, Inman Elem School, Inman Intermediate School, Landrum High School, Landrum Middle School, Mabry Middle School, New Prospect Elem, OP Earle Elementary School, Swofford Career Center, Transportation Office	Transportation User	Active			
batsonb	Batson	Brian	Inman Elem School	Principal	Active			
batsond	Batson	Dustin	Mabry Middle School	Athletics Secretary/Coach	Active			

NOTE: No records are totally deleted. They are considered inactive and will not be shown in a search unless the user specifically checks the box in the search to include deleted records.

4. Click on the button on the record you want to open.

User Details | Privileges | Schools | Activities | Accounts | Reports | Certifications | Vehicles | Contracts | Availability

User/Employee Details

Login: Change Password Password: Confirm Password:
 First Name: M.I.: Last Name:
 Gender: E-Mail: Receive Email Alerts:

The Field Trip user’s record will open. Make any and all changes you want to make and click Save at the bottom of the record to save any changes. Use the back arrow to leave the User/Employee Details window.

NOTE: Detail information regarding the User record may be found in “Add User/Driver” section.

Add User/Driver

1. Click on Add User/Driver to open the User/Employee Details dialog box.

The screenshot shows a dialog box titled "User/Employee Details". At the top, there are tabs for "User Details", "Privileges", "Schools", "Activities", "Accounts", and "Reports". Below the tabs, the "User/Employee Details" section contains the following input fields:

- Login:
- First Name:
- Password:
- M.I.:
- Confirm Password:
- Last Name:

2. Fill in the Login, First Name, Last Name field. These are the mandatory fields. Complete the other fields as required by district policy for use of Field Trip.

NOTE: The password and confirm password are only necessary if the employee is going to be accessing Field Trip.

3. In the "User Types" section of the dialog, select individual types such as Requestor, Principal, Athletics Director, or by clicking "Select All" all types will be selected.

The screenshot shows the "User Types" section of the dialog box. It features a list of user types with checkboxes. The "Select All" checkbox is checked. The user types listed are:

- Select All
- Fieldtrip Requestor
- Athletics Director
- Fleet Management Admin
- Principal
- Field and Athletic Trip Requestor
- Dispatch Supervisor
- District Office User
- Driver
- Dispatch Admin
- Transportation User
- Fleet Supervisor

NOTE: If you select Driver, other tabs will be added to reflect additional information required for scheduling a driver for trips.

The screenshot shows the "User/Employee Details" dialog box with additional tabs: "Certifications", "Vehicles", "Contracts", and "Availability". The "User/Employee Details" section contains the following input fields:

- Login:
- First Name:
- Password:
- M.I.:
- Confirm Password:
- Last Name:

4. Select the User Locations.

The screenshot shows the "User Locations" section of the dialog box. It features a list of user locations with checkboxes. The "Select All" checkbox is checked. The user locations listed are:

- Select All
- District Office
- Main Depot

Below the list, there is a "Primary Location" dropdown menu with "Transportation Office" selected.

NOTE: The Primary Location is a mandatory field even if there is only one location for the district.

5. In the Privileges tab, select any permissions the new user should have. Depending on the User Type selected, some privileges may already be selected. Review the privileges in each area and check the boxes of any boxes that apply.

NOTE: If a new user was given every user type, all privileges will automatically be given to the user.

6. In the Schools tab, select any schools that apply to the new user. Example: privileges for a new principal may only apply to the school of his responsibility.

7. In the Activities tab, select any activities that would apply to the new user.

8. In the Accounts tab, select or individual account #s that would apply to the user's responsibility.


9. In the Reports tab, check any reports that may apply to the new user and their area of responsibility.

10. In Certifications tab added for a driver, add any certifications that apply to the new user, the effective beginning and expiration dates, a due date status if applicable. Save the record. Add as many rows as necessary for each user.

11. In the Vehicles tab, add a row for each type of vehicle the driver has been trained to drive with effective beginning and ending dates.

12. At least one contract is mandatory for a driver to be considered available to drive a trip. All jobs in the job types will be in the drop down for jobs. Select the job, enter the hourly rate, the hours per week, hours per day, effective day and end date. Add as many rows as needed for each driver and the job type they are eligible to perform.

13. In the Availability tab, enter information about the availability days, hours, holiday and overnight hours. Add as many rows as necessary to create the profile of each driver.

14. Click on  to finish adding the new employee.

Search Vehicle

1. Click on Search Vehicle and the Vehicle Management window opens.

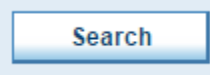
Vehicle Management

Vehicle No.: Vehicle Type:

Owner: Location:

Display Deleted Records [Add New Vehicle](#)

2. Enter just a number into the Vehicle No. field or select a search filter from a field with a drop down and click



to locate the record of any current vehicle in Field Trip.

NOTE: If your search doesn't return the array of data you expected, clear your filters and broaden your search.

3. The screen will refresh with the requested data including the number of records in the search, the vehicle type, owner, capacity, location. At the far right of each line are tools to edit, copy or delete each individual record.

Vehicle Management

Vehicle No.: Vehicle Type:

Owner: Location:


Display Deleted Records [Add New Vehicle](#)


Total Num. of Records: 55

Vehicle No	Vehicle Type	Owner	Capacity	Location	Vehicle Status	Record Status	Edit	Delete
2	Regular Bus	District Owned	78	Transportation Office	Active	Active		
111000	Regular Bus	District Owned		Main Depot	Active	Active		
503-6393	Regular Bus	State Owned	54	Transportation Office	Active	Active		
503-6395	Regular Bus	State Owned	54	Transportation Office	Active	Active		
503-6479	Regular Bus	State Owned	54	Garage 1	Decommissioned	Active		
503-6955	Regular Bus	State Owned	60	Landrum High School	Active	Active		
503-7257	Regular Bus	State Owned	62	Landrum High School	Active	Active		
503-7346	Regular Bus	State Owned	60	Chapman High School	Active	Active		
503-7389	Regular Bus	State Owned		Transportation Office	Active	Active		

NOTE: No records are totally deleted. They are considered inactive and will not be shown in a search unless the user specifically checks the box in the search to include deleted records.



4. Click on the  button on the record you want to open.

The vehicle record will open. Make any and all changes you want to make and click Save at the bottom of the record to save any changes. Use the back arrow  to leave the Vehicle Management window for that vehicle..

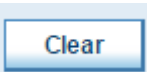
NOTE: Detail information regarding the Vehicle record may be found in “Add Vehicle” section.

Add Vehicle

1. Click on Add New Vehicle to open the Vehicle Management dialog blank form.
2. Complete the form filling in all information regarding the vehicle including the vehicle #, VIN #, type, manufacturer, model, etc.
3. If the district assigns specific drivers to the vehicle, the information may be added at the bottom of the form.

NOTE: Any driver information must be updated when the dates expire and new dates for an upcoming school year or change of driver occur.

4. Click  to save the record.

5. Click  to clear the form and enter another new vehicle.

List Maintenance

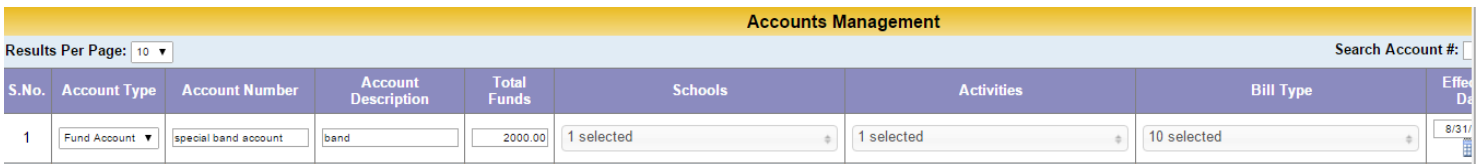
Accounts

Add account/fund information by activity and school thus allowing multiple activities at multiple schools, such as a varsity football team at each high school in the district.

1. Click on Accounts under List Maintenance.



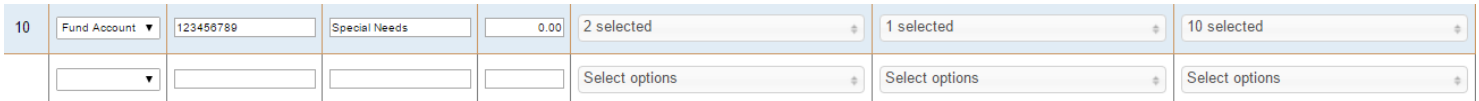
2. Accounts Management dialog box will open.




Accounts Management								
Results Per Page: 10		Search Account #:						
S.No.	Account Type	Account Number	Account Description	Total Funds	Schools	Activities	Bill Type	Effective Date
1	Fund Account	special band account	band	2000.00	1 selected	1 selected	10 selected	8/31/

3. At the bottom of the page click on .

4. A new line will be added to the bottom of the page.



10	Fund Account	123456789	Special Needs	0.00	2 selected	1 selected	10 selected	
					Select options	Select options	Select options	

5. In the Account Type field, select Fund Account, Check, or PO from the drop down.
6. In the Account Number field, add the account information. This could be either the district's account code for the specific activity at the specific school, or check/PO information from an outside source.
7. In the Account Description field, add information regarding the activity.
8. If there is budget information for Total Funds, enter the amount or skip the field.
9. In the Schools field, select the school or schools which apply to the account. For example, all high schools for the Robotics Club if they all meet together and share expenses.
10. In the Activities field, select from the options available.
11. In the Bill Type, select the type of expense which will be billed or select all at the top of the drop down.
12. Enter Effective date and Expiration date.
13. Click on  to finish.

Activity

Edit an activity

1. Click on Activity in List Maintenance to open the dialog box for Activities.

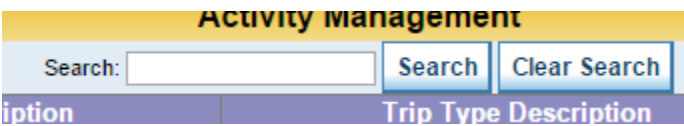


2. The Activity Management dialog will open.

The screenshot shows the "Activity Management" dialog box with a yellow header. Below the header is a search bar with "Search" and "Clear Search" buttons. Below the search bar is a table with the following data:

S.No.	Activity Description	Trip Type Description	Status	Edit	Delete
1	10th Grade	Out-of-District	Active		
2	11th Grade	Out-of-District	Active		
3	12th Grade	Out-of-District	Active		
4	1st Grade	Out-of-District	Active		

3. Enter a name of an activity or a few letters to search for a current activity to edit.



4. When you have found the record to edit, click on the 


The editing information will open below the activities list:

The screenshot shows the editing information form for an activity. The form has the following fields:

- Activity: 10th Grade
- Trip Type: Out-of-District
- Status: A dropdown menu with the following options: After School Program, Athletic Program, Federal Program, Field Trip, Fine Arts Program, Other, Out-of-District (highlighted), Special Olympics, Title One Program, Trip in district.
- Apply to User Types: A list of user types with checkboxes:

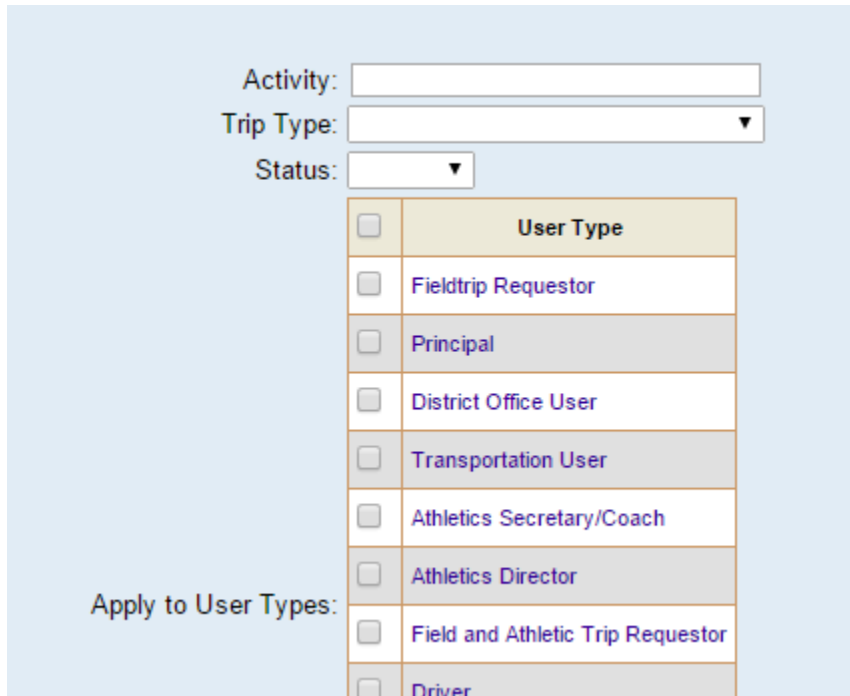
<input checked="" type="checkbox"/>	Transportation User
<input checked="" type="checkbox"/>	Athletics Secretary/Coach
<input checked="" type="checkbox"/>	Athletics Director
<input checked="" type="checkbox"/>	Field and Athletic Trip Requestor
<input checked="" type="checkbox"/>	Driver

Make any changes necessary to the Trip Type, Status, and the User Types.

5. Click  to finish.

Add an activity

1. Search for if the activity if there is a possibility it may already exist in the system. If it doesn't, a form will open to create the trip. OR If the User knows the activity is new, type the information in the form at the bottom of the Activity Management page.



Activity:

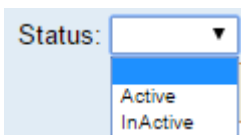
Trip Type:

Status:

<input type="checkbox"/>	User Type
<input type="checkbox"/>	Fieldtrip Requestor
<input type="checkbox"/>	Principal
<input type="checkbox"/>	District Office User
<input type="checkbox"/>	Transportation User
<input type="checkbox"/>	Athletics Secretary/Coach
<input type="checkbox"/>	Athletics Director
<input type="checkbox"/>	Field and Athletic Trip Requestor
<input type="checkbox"/>	Driver


Apply to User Types:


2. Type in the name of the new activity.
3. Select the trip type from the drop down menu.



Status:


- Active
- InActive

4. Select  the Active status.
5. Select the User Types that may create, approve, process the trips. Put a check in the



<input checked="" type="checkbox"/>	User Type
<input checked="" type="checkbox"/>	Fieldtrip Requestor

to add all User Types at once.

6. Click on  to finish.

Frequent Destination Addresses

Add the addresses of frequent destinations to the system by clicking on Frequent Destination Addresses under List Maintenance .



1. The Frequent Destinations dialog box will open.

The screenshot shows the 'Frequent Destinations' dialog box. It has search fields for Destination, Street Address, and City, along with 'Search' and 'Clear Search' buttons. Below is a table with the following data:

S.No.	Destination Type *	Destination *	Street Address *	City *	State *	Zip	Status	Delete
1	Destination	Barnes & Noble	1489 WO Ezell Blvd	Spartanburg	South Carolina	29301	Active	X
2	Destination	BiLo Center	650 North Academy Street	Greenville	South Carolina	29601	Active	X
3	Destination	BiLo Center	650 N. Academy St.	Greenville	South Carolina	29601	Active	X
4	Destination	Biltmore Estates	1 Approach Road	Asheville	South Carolina	28803	Active	X
5	Destination	Blackburn High School	301 W. Bannock Road	Blackburn	South Carolina	29677	Active	X


2. Search for a destination by entering the destination name, part or all of an address, part or all of a city.

The screenshot shows the 'Frequent Destinations' dialog box with search results. The 'City' field contains 'boiling'. The table below shows one result:

S.No.	Destination Type *	Destination *	Street Address *	City *	State *	Zip	Status	Delete
1	Destination	Boiling Springs High School	2251 Old Furnace Road	Boiling Springs	South Carolina	29316	Active	X

Below the table are buttons for 'Display Deleted Records', 'Refresh', 'Save', and 'Add New Rows'. A warning message states: 'Record(s) will be saved only if all the cells marked * in the grid rows are populated. See grid column headers.' A status message at the bottom says: 'Records that are complete, saved successfully.'

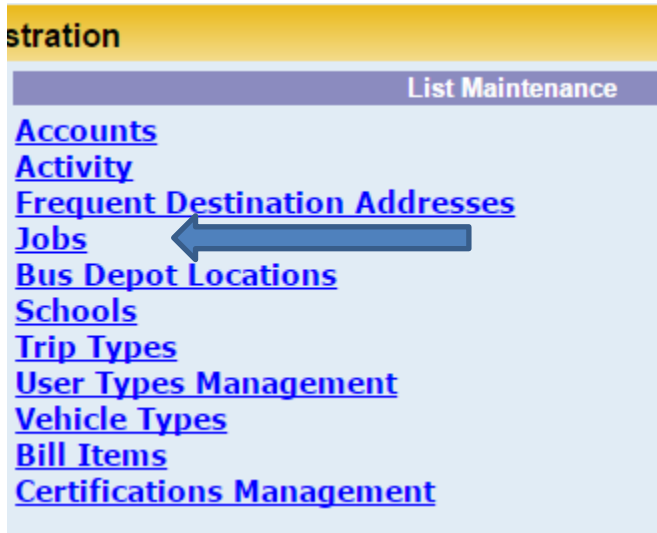
3. Add a destination by entering the destination name, street address and city.

4. Click  to finish.

Jobs

Add jobs to Field Trips.

1. Click on Jobs in List Maintenance.



2. The Job Management dialog box will open.

S.No.	Code	Job	Activity Job	Driver Job	Monitor Job	Edit	Delete
1		Activity Driver	Yes	Yes	No		
2		Coach	Yes	Yes	No		
3		Regular Bus Driver	Yes	Yes	No		
4		Special Needs Bus Driver	Yes	Yes	Yes		

Edit a Job

3. Click on Display Deleted Jobs and to see all jobs that have ever been entered into Field Trip.

4. If the job title the User is looking for is in the list, the record may be edited by clicking on .

5. The information to edit for the job title will be displayed at the bottom of the dialog.

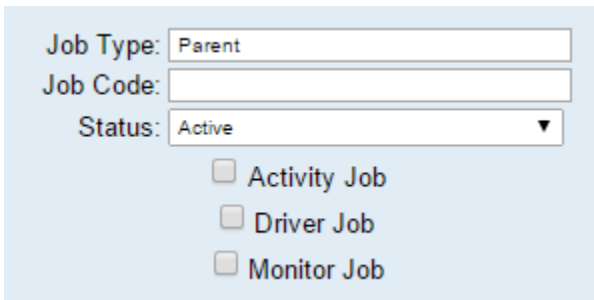
The screenshot shows a form for editing a job. It includes the following fields and options:

- Job Type: Director
- Job Code: (empty)
- Status: InActive
- Activity Job
- Driver Job
- Monitor Job

6. Make necessary changes. Click to finish the change.

Add a New Job

1. When the Job Management screen opens the form to add a new job is at the below the list of current jobs.



Job Type: Parent
Job Code:
Status: Active ▼
 Activity Job
 Driver Job
 Monitor Job

2. Fill in the Job Type.

3. Job Code—use this for specific district information for the job.

4. Choose Status: Active.

5. Check the boxes appropriate: Activity Job, Driver Job, Monitor Job or leave blank.


6. Click  to finish.

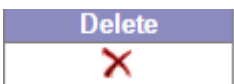
Bus Depot Locations

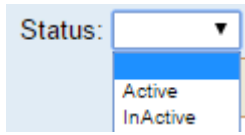
Add or edit bus depot locations.

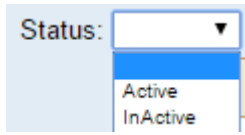
1. Click on Bus Depot Locations in the List Management.

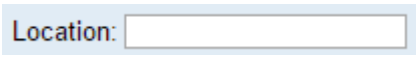


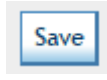
Click  to change the status of a location in the Location Management list.

Click  to eliminate the location permanently from the system.



Click  to change the status of a location from Active to Inactive.

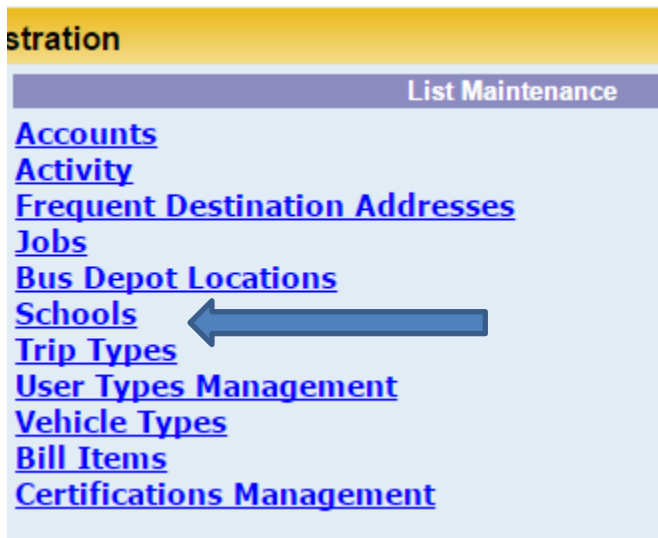
Add the name of a new location by typing it in the . Add the Status.

Click  to finish.

Schools


Add, edit, or delete a school.

1. Click Schools in the List Maintenance to open the Schools Management dialog box.



Edit a School



1. Click  next to the school to be edited.
2. The details regarding the school will display in the School/Organization Details dialog below the schools list.

School/Organization Details

School:

School Abbreviation:

Location:

School/Org. Type:

Address:


City: State:

Zip:

Phone:

LDAP Context:

Status:

3. Make necessary changes and click  to finish.

Add a School

1. Add information regarding new facility in the School/Organization Details dialog box below the schools list in the School Management screen.

School/Organization Details

School:

School Abbreviation:

Location:

School/Org. Type:

Address:

City: State:

Zip:

Phone:

LDAP Context:

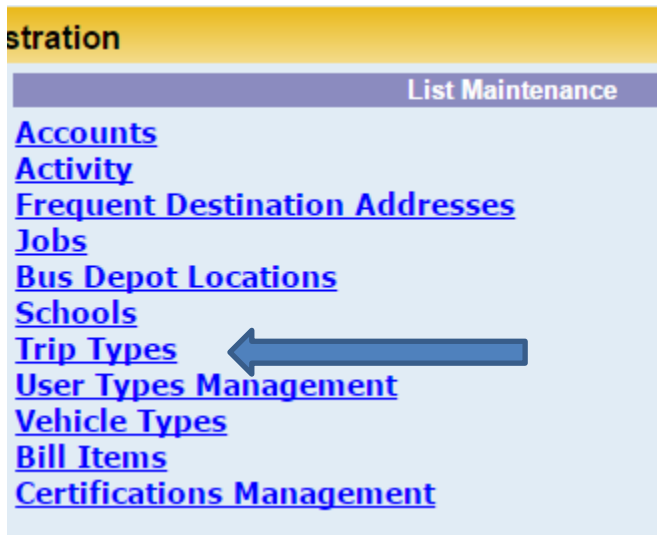
Status:

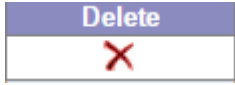
2. Click  to finish.

Trip Types

Add or delete a Trip Type.

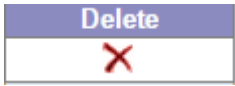
1. Click on Trip Types in List Maintenance.

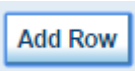


The Trip Types dialog opens. Trip Types with no  cannot be deleted.

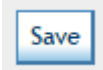
A screenshot of the 'Trip Types' dialog showing a table with three columns: Type, Status, and Delete. The table contains six rows of trip types.

Type	Status	Delete
After School Program	Active	
Athletic Program	Active	
Federal Program	Active	X
Field Trip	Active	
Fine Arts Program	Active	X
Other	Active	X

Delete unneeded trip types by clicking .

To add a trip type click on . A new line will be added to the list.

<input type="text"/>		
----------------------	--	--

Type in the name of the trip type and . The Status will auto-fill with "Active."

<input type="text" value="New trip type"/>	Active	X
--	--------	---

User Types Management

Add or Edit a User Type.


Click on User Types Management in List Maintenance.



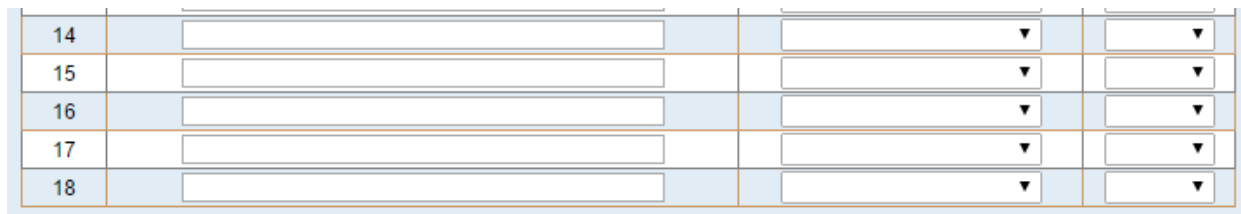
The User Type Management dialog box will open showing all of the User Types and their Type Group and Status.

User Type Management			
S.No.	User Type	User Type Group	Status
1	Fieldtrip Requestor	REQUESTOR ▼	Active ▼
2	Principal	APPROVER ▼	Active ▼
3	District Office User	READ_ONLY ▼	Active ▼
4	Transportation User	PROCESSOR ▼	Active ▼
5	Athletics Secretary/Coach	REQUESTOR ▼	Active ▼

NOTE: Primary Users cannot be changed from Active to Inactive.


1. To add a new type, click on .

2. Multiple lines are added to the list.




The image shows a screenshot of the User Type Management table with five new empty rows added. The rows are numbered 14 through 18. Each row has empty input fields for the User Type, User Type Group, and Status columns.

3. Type in the title of the new user type, select the User Type Group, and select “Active” as the status.



The image shows a screenshot of the User Type Management table with row 14 filled in. The User Type is 'New User Type', the User Type Group is 'READ_ONLY', and the Status is 'Active'.

4. Click  to finish. Unused rows in the table will be removed from the list.

Vehicle Types


Add, edit or delete vehicle types.

station











List Maintenance


- [Accounts](#)
- [Activity](#)
- [Frequent Destination Addresses](#)
- [Jobs](#)
- [Bus Depot Locations](#)
- [Schools](#)
- [Trip Types](#)
- [User Types Management](#)
- [Vehicle Types](#) ←
- [Bill Items](#)
- [Certifications Management](#)

Click on Vehicle Types in List Maintenance to open the Vehicle Type Management dialog box.

Add a new vehicle type by typing in the vehicle type box , selecting “Active” for the status. 



Vehicle Type Management



S.No.	Vehicle Description	Status	Edit	Delete
1	Special Needs Bus	Active		
2	C2	Active		
3	Other	Active		
4	Big Bus w/storage	Active		
5	Regular Bus	Active		

Display Deleted Records 

Vehicle Type:

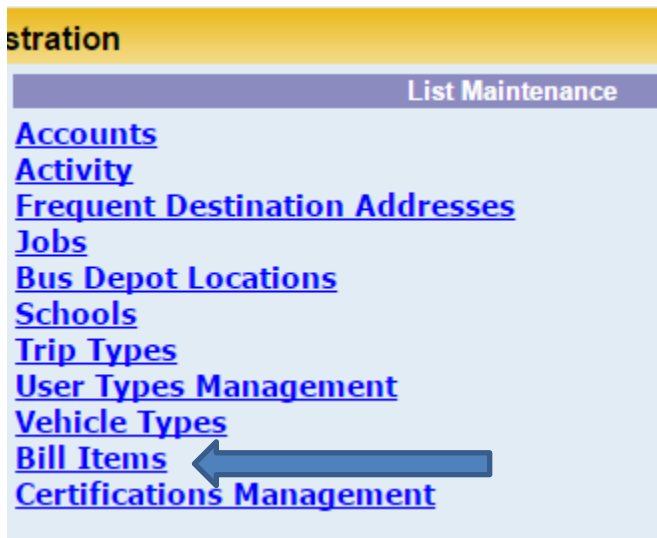
Status:

Click Edit  to change the status from Active to Inactive. 

Bill Items

Add or change the Active status on billing items.



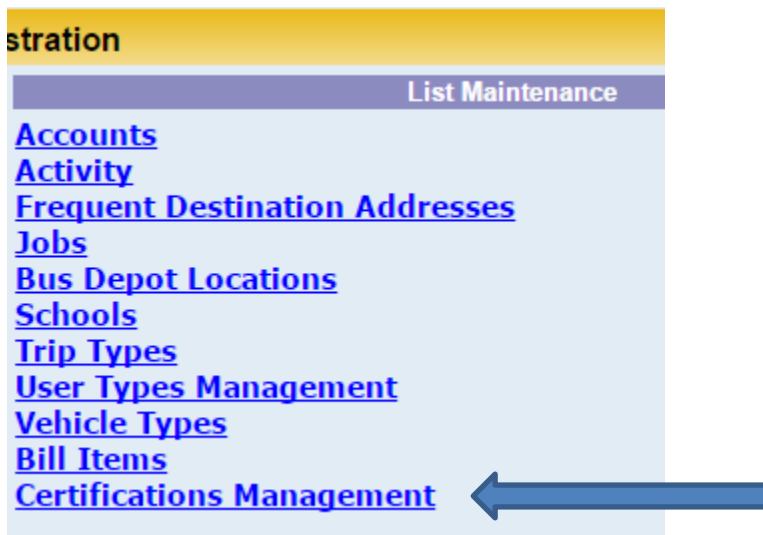
After opening the Bill Items Management dialog, a list of current billing items will be shown. The Active field displays True for all active records.

Clicking on **Display Deleted Records** will show any records which will be listed as False in the Active Field.

Certifications Management

Add certifications, edit explanation/comments, delete/inactivate.


Open the Certifications Management in List Maintenance.



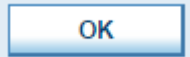
Edit current certifications by clicking in the comments field and changing explanations/comments regarding the certification.

Certification Management				
S.No.	Certification	Class Hours	Comments	Active
1	Wheelchair Training	0	Wheelchair Training	Yes ▼
2	Car Seat Training	0	Car Seat Training	Yes ▼
3	10 Hour Advanced Course	0	10 Hour Advanced Course	Yes ▼
4	10 Hour Basic Course for Attendants	0	10 Hour Basic Course for Attendants	Yes ▼
5	CPR	0	CPR	Yes ▼
6	DS872	0	DS872	Yes ▼

Change the Active field by clicking on the down arrow and selecting No.

Add new certifications by clicking on . Multiple rows will be added to the table.

Type information in each field regarding the name of the certification, class hours and comments/explanation of the certification. Yes will be the default in the Active field.

Click  to finish all edits to the table and finish.

Application Configuration

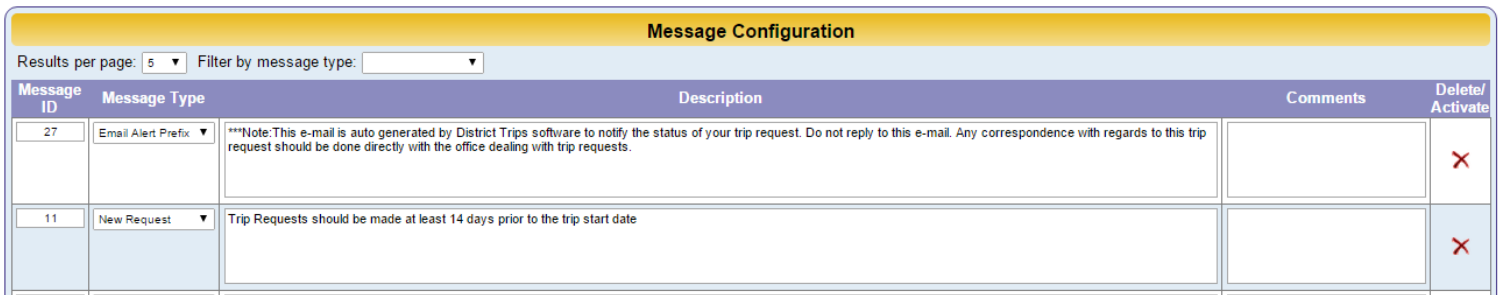
Application Configuration

Changes may be made regarding configurations across the application in this area. Some lines in the configuration are easily understood such but most, though available for editing, are unclear as to their meaning and the possible change in the program. Contact Compass Support for any Application Configurations which may be in question.

Configure Messages


If the User wants to create Notification Messages, the messages will be created in this area.

To review current messages or create a new message, click on Configure Messages to open the Message Configuration dialog. When the dialog opens, the User will be able to view all current messages.



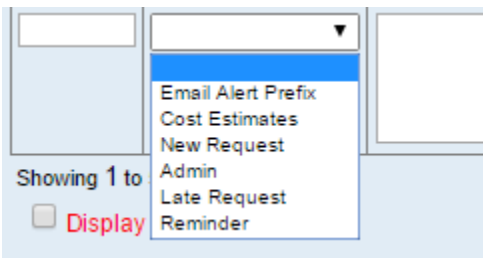
Message Configuration				
Results per page: 5		Filter by message type:		
Message ID	Message Type	Description	Comments	Delete/Activate
27	Email Alert Prefix	***Note:This e-mail is auto generated by District Trips software to notify the status of your trip request. Do not reply to this e-mail. Any correspondence with regards to this trip request should be done directly with the office dealing with trip requests.		X
11	New Request	Trip Requests should be made at least 14 days prior to the trip start date		X

Create a new Message

1. Click  to create a new message.
2. A new row will be added to the list of current messages.



3. In the Message type field click on the down arrow to display the drop down list of options.



Select the type of message it will be out of the list.

Approval Path

By opening the Approval Path, the approval process may be seen with all steps displayed. This path is created by the Seon Field Trip development team at the time of site set up for the district.

Contact Support to request assistance with changes, additions, amendments to the approval path in Field Trip.

Blackout and Holiday Management

Dates may be specified on the Dashboard calendar for holidays, no travel days, and no school days.

1. Click on Blackout and Holiday Management in Application Configuration section.



2. A list will open in the No Trip Days Management dialog box.

No Trip Days Management							
Start Date	End Date	Reasons	Comments	Status	Edit	Delete	
6/18/2015	6/19/2015	Graduation		Active			
8/19/2015	8/19/2015	Transportation in Service Day-no drivers available	No drivers available due to mandatory in-service training.	Active			
8/24/2015	8/24/2015	School Start		Active			
9/07/2015	9/07/2015	Labor Day		Active			
11/26/2015	11/29/2015	Thanksgiving	Only approved athletic trips may be scheduled.	Active			

Display Older Holidays

3. Add a Blackout Day in the dialog box below the No Trip Days Management list.

Blackout Days

Start Date End Date

After School Program Other
 Athletic Program Out-of-District
 Federal Program Special Olympics

Trip Types Field Trip Title One Program
 Fine Arts Program Trip in district
 New trip type
 Select All Trip Types

Reason

Comments


Record saved Successfully

4. Fill in the information regarding the Start Date and End Date—these dates may be the same for a single day or a range for a school break such as Thanksgiving.

Check the types of trips that will not be allowed during the blackout or select All Trip Types to check all boxes.

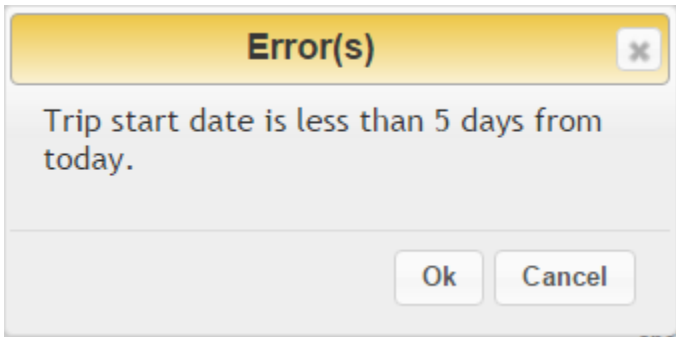
The Reason field will be exactly what shows on the calendar. Please note in the No Trip Days Management illustration the reason is lengthy and shows on the calendar verbatim.

The Comments field is for Transportation notes.

5. Click  to finish.

Generate Override Key

When a Requester attempts to create a trip inside the acceptable time frame set by district policy, they will receive an error when they attempt to submit the trip.

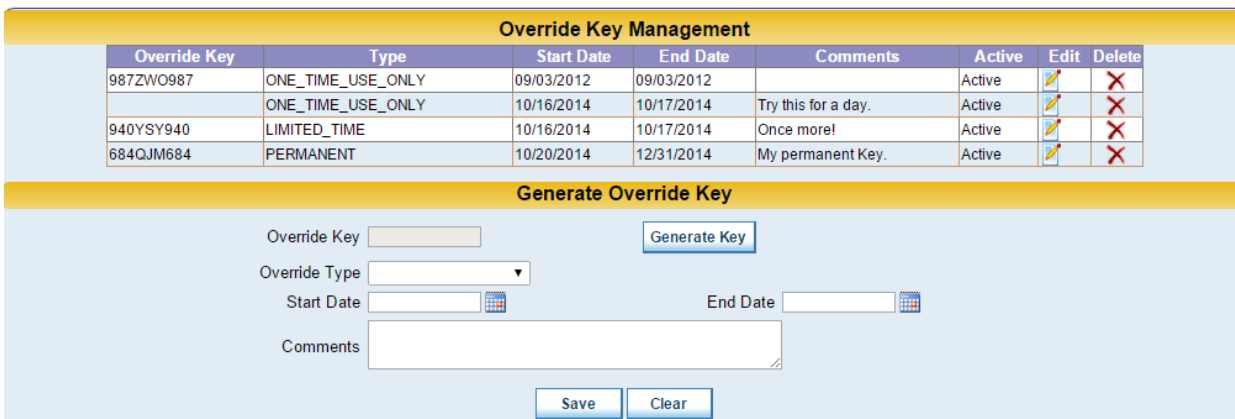


The Requester will not be able to submit the request until they receive an Create an override key to be sent to Requester for a short-notice trip.

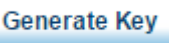

1. Click on Generate Override Key in Application Configuration.



2. The Override Key Management dialog box will open.



3. Complete the Generate Override Key form adding whatever information in the Comments box that apply to the special circumstances needing an override key.

4. Click the . Then click . The new override key information will be added to the list in the Override Key Management screen.

Override Key	Type	Start Date	End Date	Comments	Active	Edit	Delete
987ZWO987	ONE_TIME_USE_ONLY	09/03/2012	09/03/2012		Active		
	ONE_TIME_USE_ONLY	10/16/2014	10/17/2014	Try this for a day.	Active		
940YSY940	LIMITED_TIME	10/16/2014	10/17/2014	Once more!	Active		
684QJM684	PERMANENT	10/20/2014	12/31/2014	My permanent key.	Active		
603OHS603	ONE_TIME_USE_ONLY	09/03/2015	09/07/2015	Ambassador spec trip 9/7/2015	Active		

5. Communicate the override key information to the Requester so they can submit the trip for approval and processing.

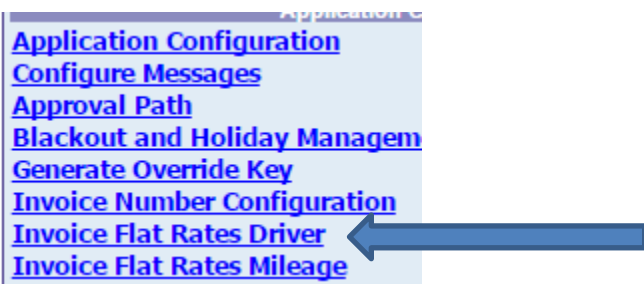
Invoice number Configuration

Transportation User can either use the default settings for invoice numbering or configure invoice numbers to a standard for the district.

Invoice Flat Rates Driver

Change/edit rates for invoicing for driver time for all trip types including out of district trips and overnight trips while allowing for flat rates or hourly for each trip type.

Click on Invoice Flat Rates Driver in Application Configuration.



The Invoice Rates Information dialog box will open.

Invoice Rates Information

Dispatcher Time
 Driver Time
 Mileage
 Monitor Time

S.No.	Pay Type	Rate Type	Trip Type	Out of District	Over Night	Rate
1	Driver Time	Daily - Flat Rate	After School Program	No	No	
2	Driver Time	Daily - Flat Rate	After School Program	No	Yes	
3	Driver Time	Daily - Flat Rate	After School Program	Yes	No	
4	Driver Time	Daily - Flat Rate	After School Program	Yes	Yes	
5	Driver Time	Daily - Flat Rate	Athletic Program	Yes	Yes	
6	Driver Time	Daily - Flat Rate	Athletic Program	Yes	No	
7	Driver Time	Daily - Flat Rate	Athletic Program	No	Yes	
8	Driver Time	Daily - Flat Rate	Athletic Program	No	No	

Set Rates in Grid

Rate Type:
 Trip Type:
 Out of District:
 Over Night:
 Rate:

NOTE: Setting Rates in the Grid does not save your changes. Click on the Save button after you make changes to the grid.

23	All
24	Hourly - Flat Rate
25	Daily - Flat Rate
26	Other
27	Bus Usage Only (Hourly)
28	Van Usage Only
29	Less than 4 hours - Flat Rate
30	More than 4 hours - Flat Rate
31	Per Mile
32	Daily
	Other
	Less than 60 Miles
	More than 60 Miles
	Hourly - Contract
	In District Std. 2 Hours
	In District Std. 2.1 - 3.0 Hours
	In District Std. 3.1 - 4.0 Hours
	In District Std. 4.1 - 5.0 Hours
	In District Std. 5.1 - 6.0 Hours
	In District Std. 6.1 - 7.0 Hours

Hourly - Flat Rate	Athletic Pro
Hourly - Flat Rate	All
Hourly - Flat Rate	Field Trip
Hourly - Flat Rate	After School Program
Hourly - Flat Rate	Athletic Program
Hourly - Flat Rate	Shuttle Trip
Hourly - Flat Rate	Title One Program
Hourly - Flat Rate	Fine Arts Programs
Hourly - Flat Rate	Federal Program
Hourly - Flat Rate	Out-of-District
Hourly - Flat Rate	Federal, Title 1, Special Olympics, or Fine Arts
Hourly - Flat Rate	In-District Customers, Schools
Hourly - Flat Rate	Field Trip
Hourly - Flat Rate	New test trip type
Hourly - Flat Rate	Conference
Hourly - Flat Rate	Activity
Hourly - Flat Rate	Shuttle
Hourly - Flat Rate	After School

Rate Type: Trip Type:

Invoice Flat Rates Mileage

Request Status Management

Request Number Configuration

Permit Number Configuration

Vehicles Rates by Owner

User Notifications

Current online users

User Inbox Summary

Glossary











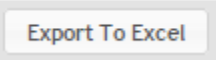
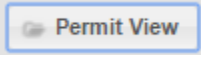
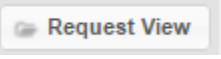
Term	Description
Activity/Group	List of activities/groups within the district
Bill Item	The item currently being billed
Bill To	The School/Org. that will pay for the trip
Bus Lot to School	The trip time and mileage information in going from the Bus Lot to the School/deadhead mileage
Bus Type	List of 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 regarding trip details
Date Range	The Start date and the End date for the Trip
Destination	Location of the event for the trip
Destination to School	The trip time and mileage information for return from 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	The sum of transportation costs for a single or selected vehicles

Cost	
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 or after the destination and before return to school
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	A trip that spans multiple dates
Payment Method	Mode of payment such as Purchase Order, Check, Fund Account
Permit (Ticket)	Assignment of Vehicle(s) and driver(s) to request. One or more permits may be 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/adults will be picked up for the trip
Request No.	Each submitted Request is associated with a unique request number.
Requester	The person making the request for the trip
School	School associated with a requester or trip
School to Bus Lot	The trip time and mileage information from the School to the

	Bus Lot post trip completion
School to Destination	The trip time and mileage information from the School to the Destination
Special Instructions	Any special instructions related to the trip such as football equipment, intermediate stop information
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 such as New, Accepted for Processing, Permit(s) Granted, Billing Complete, Invoice Generated, Payment Received, Cancelled
Trip for Competitive Event	Notes this trip is for a competitive event
Trip on Approved List	Notes if 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 be 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 associated with transportation personnel for overnight trips
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.
- 
Exports all records in the user's Compass Field Trip to Excel
- 
Changes Inbox configuration to show Vehicle and Driver assignments.
- 
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

Vehicle(s) furnished by Transportation?

Y

N

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

Driver(s) furnished by Transportation?

Y

N

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.

of Wheel Chairs

of Car Seats

Special Instructions

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.

<input type="checkbox"/>	Request #	Submission Date	Start D.
<input checked="" type="checkbox"/>	2327	08/11/2015	8/27/20

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	


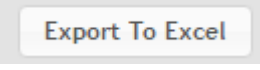
Drop Off Location: Campobello Gramling School 250 Fagan Avenue Campobello SC 29322 Trip on Approved List? _____

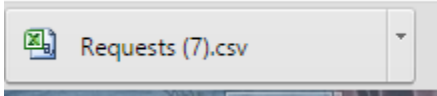
Group/Activity: Baseball Trip for Competitive Event? No

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 trips be exported to an Excel spreadsheet?

Select the trip or trips 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.