Activity: Field Trips

Adding a New Field Trip
1. Click **New**
2. Complete **Trip Information and Estimates section**
   a. Enter name of trip destination in the **Destination Name Field**
   b. Tab to **Destination Address** to enter street address of trip destination
   c. Tab to Estimated Mileage to enter the **ESTIMATED ROUND TRIP** mileage
   d. Tab to **Contact Employee #** to enter or select from drop down the employee of field trip contact – contact **MUST** be an active employee
      i. **Contact Name** and **Contact Email** will **default** based on Contact Employee #
   e. Tab to **Contact Phone** to enter phone number or extension of field trip contact
   f. Tab to **Departure Date** - enter date or use calendar to enter date of field trip departure
   g. Tab to **Departure Time** - select hour, minute and AM/PM
   h. Tab to **Return Date** - enter date or use calendar to enter date of field trip return
   i. Tab to **Return Time** - select hour, minute and AM/PM
   j. Tab to **Trip Type** - use drop down to select Athletic, Band, Special Olympics, Student Activity or Vocational
   k. Tab past **Estimated Cost**, this will default and update as fields are changed

💬 **Location** and **Garage** fields will **default**

💬 If trip is within **two weeks**, please reach out to Transportation Operations to release. Trip can be entered, but not released.

3. Complete **Vehicles and Equipment** section
   Mandatory Fields:
   a. Tab to **Vehicle Type** - use drop down to select Van or Bus
   b. Tab to **Vehicles Count** to enter number of vans or buses requested
   c. Tab to **Passenger Count** to enter total number of passengers, including chaperones
   d. Tab to **Pickup Location** to enter location at school for pickup (e.g. bus loop, football field, etc.)
   Optional Fields:
   e. Tab to **Wheelchair Count** - enter total numbers of wheelchairs
   f. Tab to **H-strap Count** - enter total number of H-straps requested
   k. Tab to **School Comments** - enter additional information or requests
4. Complete **GL Coding**
   a. GL Coding will **default** based on trip type selected
   b. If GL Coding changes are needed:
      i. Use drop down to display list of accounts available for your location
      ii. If account needed is not in drop down manually enter coding
   c. If more than one GL coding will be used
      i. Use drop down to select or manually enter first line of coding
      ii. Tab to Percent - enter percent of coding first line will use for trip
      iii. Repeat above steps until percent for all GL accounts add up to 100%

💬 If **Title 1 funds** are used a **Y** will populate under the Title 1 field

5. Click **Release** in ribbon - the system will display a confirmation message, select **Yes** then status is updated to Pending

Duplicate Trip
1. Search trip to Duplicate on Dashboard
   a. From Dashboard click on trip
2. Once trip is selected select **Detail** in Ribbon
3. Select **Duplicate** in ribbon
4. Update **Trip Information** and **Vehicles and Equipment** sections as needed
5. Enter **GL Coding** (Note: The coding will NOT copy from the trip that was duplicated and must be added)
6. Click **Release** in Ribbon

Updating Rejected Trip
1. Search Rejected trip in Dashboard
2. From Dashboard click on trip
3. Once trip is selected select **Detail** in Ribbon
4. Enter corrections for rejected trip
5. Click **Release** in ribbon – the system will display a confirmation message, select **Yes** then status is updated to Pending

Delete Created, Pending or Rejected Trip
1. Locate trip in Dashboard
   a. From Dashboard select trip
   b. Select **Delete** in Ribbon – system will display a confirmation window, select **Yes**

Trips in other status' **cannot** be deleted. If a trip that has been approved or accepted is no longer needed, please contact Transportation for cancellation.

Dashboard Searching and Filtering
1. Tabs
   a. Upcoming Trips: Any trips coming up within the next **two months**
   b. Action Items: Any trips that need an action to be completed
   c. This year: Any trips within Fiscal year (7/1-6/30)
   d. All Trips: All trips for school/department
2. Filtering – leaving filtering criteria blank will default to all trips
   a. Begin/End date
   b. Destination/Contact
   c. Workflow Status
   d. Trip number