## TRIP TRACKER

#### **Transportation Department**



# Why? What are the Benefits?

- Simplicity no more paper forms that get "lost " in the mail
- Efficiency mo more mail delays
- Accountability greater visibility in the process results in greater accountability

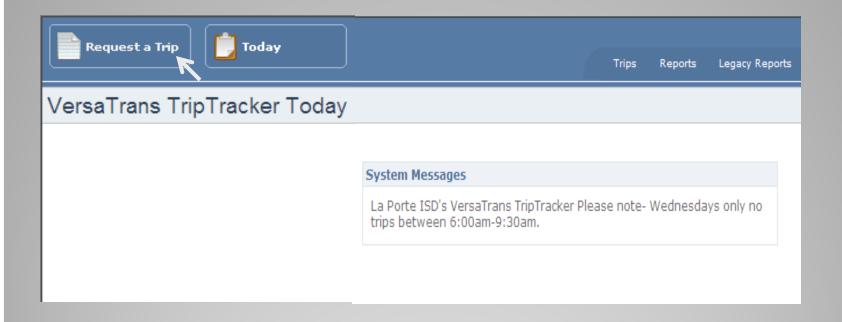
#### ENTERING A TRIP

Trip Tracker Today

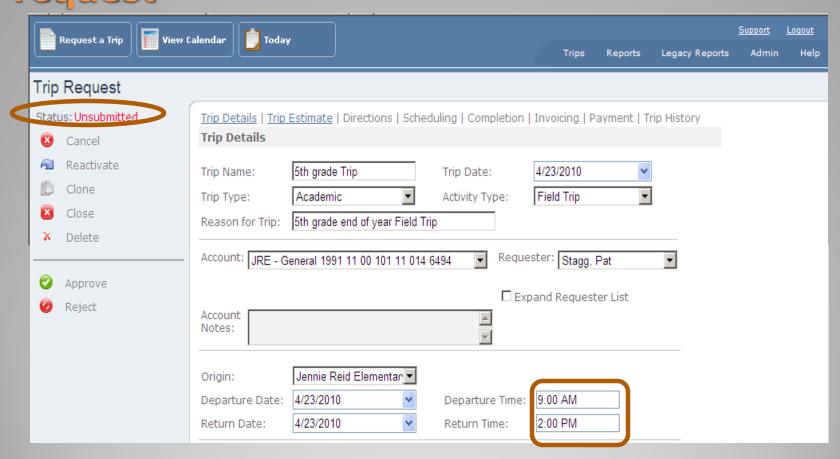
Starting the Process: Request a Trip

Entering Trip Details

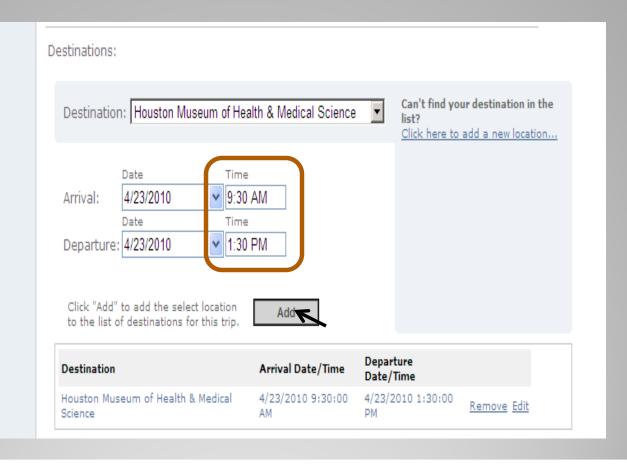
### Select "Request a Trip" from the Menu



## <u>Trip Details</u>-Enter details from the trip request



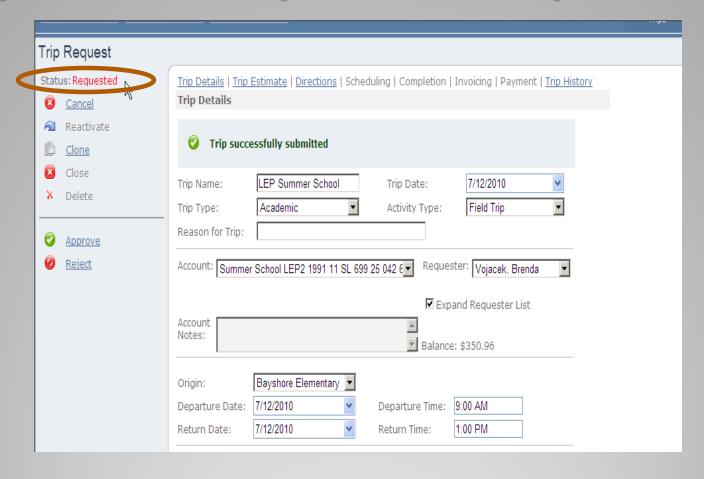
## Trip Details - Enter the trip Destination details. Click Add to populate the trip destination.



<u>Trip-Details</u> -Enter the number of students, adults, wheel chairs, vehicles and special accommodations. Enter trip contact information and notes. Click "Submit" to create the trip request.

Adult Number Of:	s Students Wheelchairs Vehicles 4 98 2 □ Special Accommodations
Contact Name: Notes:	Sally Sue Contact Phone: 281-604-7044  Please pick up students and staff at the front of the building.
Express Trip	Submit Cancel

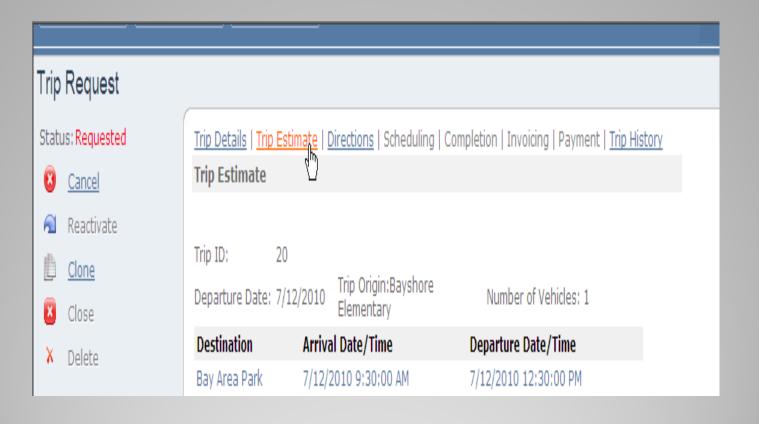
## Status will change from Unsubmitted to Requested once trip is successfully entered



## **Entering the Trip Estimate**

- How much money am I going to spend?
- What about parking fees, tolls and meals for the driver?
- Special Note: Requestor can get total estimated expenses prior to trip approval
- Trip estimates are just estimates and additional costs can be incurred

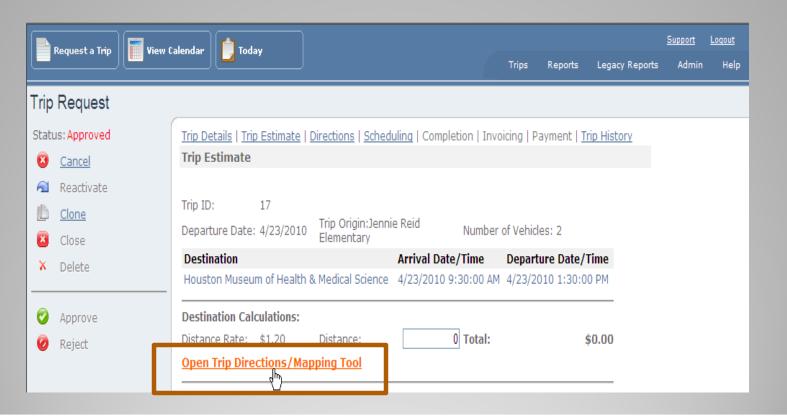
# Select <u>Trip Estimate</u> from the Trip Request Screen



#### **Trip Estimate** - Displays Initial Trip Estimates

Trip Estimate						
Trip ID:	17					
Departure Date:	4/23/2010	Trip Origin:Jennie Elementary	Reid	Number	of Vehicles: 2	
Destination			Arrival Date/	Time	Departure Da	te/Time
Houston Museu	m of Health &	Medical Science	4/23/2010 9:3	30:00 AM	4/23/2010 1:3	30:00 PM
Destination Cal	culations:					
Distance Rate:	\$1.20	Distance:	0	Total:		\$0.00
<u>Open Trip Dire</u>	ctions/Map	ping Tool				
Time Calculation	ns:					
Start Date:	4/23/2010	Return Date:	4/23/2010			
Start Time:	9:00 AM	Return Time:			Hours: 5.00	+04.50
Driving Rate: Sit Rate:	\$12.26 \$12.26	Driving Hours: Sit Time Hours:		Total: Total Sit:		\$24.52 \$98.08
Overnight Rate:	\$0.00	Overnight Hours:	U	Total Ove	_	\$0.00
				Total Tin	1e:	\$122.60
Total Estimated	Expenses fo	r Trip:				
Tolls:	\$0.00	Parking:	\$0.00	Hotel:	\$0.00	
Meals:	\$0.00	Misc Charges:	\$0.00			
				Estimate	Total:	\$0.00
Calculate				Trip Tota	ıl:	\$122.60
					Çar	ve Estimate
					Sa	ve Estimate

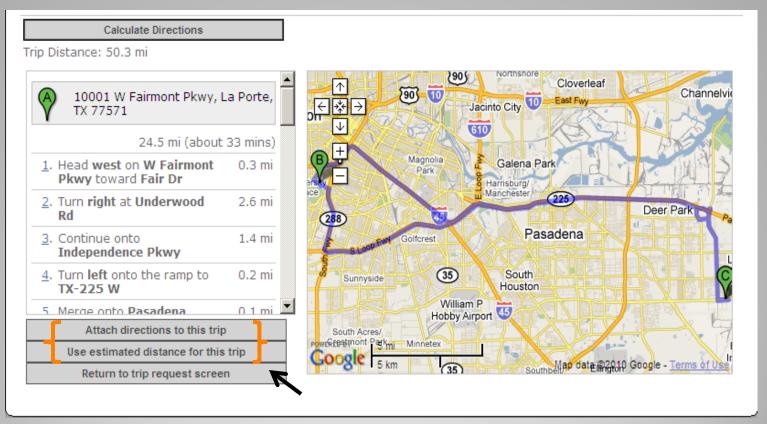
# Trip Estimate – Use Trip Directions to get distance for calculating the destination. Select "Open Trip Directions/Mapping"



# Point to Point Driving Directions - Select "Calculate Directions" to use Destination address to get Google Maps

Point-to-Point Driving Directions Use this tool to estimate trip distances, Origin	and	to assist in determinin	g point-to-point directions.	Print   Close
Location: Jennie Reid Elementary	Add	ress: 10001 W Fairmont	Pkwy La Po	
Destinations  Location:  Address:  ✓ Include return to origin	Add	Destinations Houston Museum of Health & Medical Science Clear All Destinations	Address 1515 Hermann Dr. Houston TX USA	remove
Calculate Directions  Trip Distance:	1/2			

<u>Trip Estimate</u> – Select "Use estimated distance to this trip" to populate the distance for destination calculation and "Attach Directions to this trip" to attach Google Map's Directions to the Trip Request



# <u>Trip Estimate</u> – Enter Total Estimated Expenses for Trip, Select "Calculate" and "Save Estimate" to update the estimated trip total

Total Estimate	ed Expenses for Trip: \$0.00 Parking:	\$10.00	Hotel: \$0.0	0
Meals:	\$50.00 Misc Charges:	\$0.00	Hotel. \$0.0	0
			Estimate Total:	\$60.00
Calculate			Trip Total:	\$174.54
				Save Estimate

## <u>Completed Trip Estimate</u> – Includes Distance and Time Calculations and Estimated Expenses

Trip Estimate	Trip Estimate					
Trip ID: Departure Date:	29 7/30/2010	Trip Origin:LPISD / Building	Administration	Number of Vehicles: 1		
Destination		Arrival Date/Ti	me	Departure Date/Tir	ne	
Aquarium - Do	wntown	7/30/2010 10:4	5:00 AM	7/30/2010 1:15:00	PM	
Destination Ca	lculations:					
Distance Rate:	\$1.20	Distance:	55.4	Total:	\$66.48	
Open Trip Dir	ections/Ma	pping Tool				
Time Calculati	ons:					
Start Date:	7/30/2010	Return Date:	7/30/2010			
Start Time:	10:00 AM	Return Time:	1:55 PM	Total Trip 3.92 Hours:		
Driving Rate:	\$12.26	Driving Hours:	1.42	Total:	\$17.41	
Sit Rate:	\$12.26	Sit Time Hours:	2.50	Total Sit:	\$30.65	
Overnight Rate:	\$0.00	Overnight Hours:	0	Total Overnight:	\$0.00	
				Total Time:	\$48.06	
Total Estimate	d Expenses f	or Trip:				
Tolls:	\$0.00	Parking:	\$10.00	Hotel: \$0.00		
Meals:	\$50.00	Misc Charges:	\$0.00			
				Estimate Total:	\$60.00	
Calculate				Trip Total:	\$174.54	
				Sa	ave Estimate	

# Adding Directions to a Trip Request (Optional)

- Printed with the trip sheet
- May be:
  - 1) Entered manually
  - 2) Imported from an accepted format
  - 3) Copied and pasted from another source
  - 4) Reloaded from Trip Location directions

#### <u>Directions</u> – Gives you the option to add preprinted directions or use the "Open Trip Directions/Mapping Tool" to use Google maps

Trip Details   Trip Estimate   Directions   Scheduling   Completion   Invoicing   Payment   Trip History							
Trip Estimate							
Trip ID:	28						
Departure Date:	7/29/2010	Trip Origi Building	n:LPISD A	dministratio	n Nun	nber of Vehicles: 1	
Destination			Arrival D	ate/Time		Departure Date/T	ime
San Antonio C	Convention Ce	nter	7/29/201	0 12:00:00	PM	7/30/2010 5:00:00	PM
Destination Calculations:							
Distance Rate	\$1.20	Distance	:		Tota	al:	\$0.00
Open Trip Directions/Mapping Tool							

# <u>Directions</u> – Once Point to Point directions have been attached you can select the link "View these directions"

- Turn RIGHT on KIRBY BLVD go 1.75 mi
- 5. Turn RIGHT on FM-528 go 3.08 mi
- 6. Continue on NASA BYP go 0.41 mi
- Take ramp onto E NASA RD 1 toward TX-3/SARAH DEEL DR/NASA PKWY go 0.73 mi
- 8. Continue on FM-528 go 10.31 mi
- 9. Bear LEFT on N ALVIN BYP (TX-35 S) go 2.38 ▼

Point-to-Point directions for this trip have been attached. These directions are in addition to any notes or directions entered into the field above.

View these directions | Clear these directions

Open Trip Directions/Mapping Tool

Excel (.xls)

PowerPoint (.ppt)

Word 2007 (.docx)

Excel 2007 (.xlsx)

3. "Copied" and "pasted" from another source

The default directions from the location may be reloaded using the link provided.

## <u>Directions</u> – Select "Calculate Directions" to see the attached map. Map can be printed also

Point-to-Point Driving Directions Use this tool to estimate trip distances, and to assist in determining point-to-point directions.  Origin  Location: LPISD Administration Building Address: 1002 San Jacinto Ave. La Port					
Destinations  Location:  Address:  Add  ✓ Include return to origin	Destinations Address San Antonio Convention 110 Tuleta Dr San Antonio TX USA remove Center  Clear All Destinations				
Trip Distance: 449 mi  1002 San Jacinto Dr, La Porte, TX 77571	⊕ Belton  Georgetown.  Bryan Huntsville  Cedar Parko • Round Rock				
225 mi (about 3 hours 45 mins)  1. Head southeast on San 420 ft  Jacinto Dr toward Park Dr	Fred + ksburg Lakewayo Conroe  Austin Spring Beaumon  New GSan Marcos				
2. Take the 1st right onto 0.1 mi Park Dr  3. Take the 1st right onto E 1.0 mi	Braunfels Seguin 10 Pasadena Pasadena				
Fairmont Pkwy  4. Turn right toward TX-146 N 0.1 mi	San Antonio Genzales League City  OFloresville Cuero  Bay City  Galveston  Bay City				
5. Take the ramp on the left 2.0 mi onto TX-146 N  Attach directions to this trip  Use estimated distance for this trip	Sallo Pleasanton Kenedy Victoria Freeport  2813  Sewered By 50 mil 37 Beevylle				
Return to trip request screen	Map data ©2010 Google, INEGI - Terms of Use				

## **Approval Process**

- Select a "Requested" trip from Trip Search screen
- Verify trip estimates attached to trip prior to approval
- Review messages & comments associated with the trip

## <u>Trip Details</u> – Locate the desired Trip that has a Status of Requested



Search I <u>Trip ID</u>	<u>Status</u>	<u>Trip Name</u>	Reason For Trip	Account	<u>Trip Date</u>	Requester
21	Requested	GT Summit		Test 3 1990 12 345 test	6/29/2010	Lyons, Kim
20	Requested	LEP Summer School		Summer School LEP2 1991 11 SL 699 25 042 6494	7/12/2010	Vojacek, Brenda
19	Paid	Just a test 3	To test software for training packets	Test 3 1990 12 345 test	5/07/2010	Lyons, Kim

## Trip Details - Review the Trip Details for the trip including the account information

Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History

#### **Trip Details**

Trip Name: Just a test 3

Trip\_ID: 19

Trip Date: 5/7/2010
Trip Type: Academic
Activity: Field Trip

Reason for Trip: To test software for training packets

Submitter: admin

Requester: Lyons, Kim

Account: Test 3 1990 12 345 test
Account Notes: This is just a test 3

Origin: Support Services

Origin Departure Date/Time: 5/7/2010 9:00:00 AM
Origin Return Date/Time: 5/7/2010 3:00:00 PM

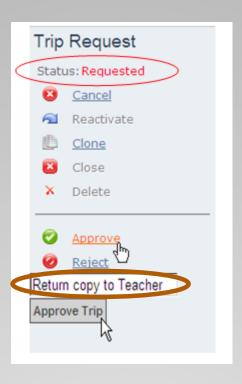
Destination	Arrival Date/Time	Departure Date/Time
Wortham Theater	5/7/2010 10:00:00 AM	5/7/2010 2:00:00 PM

No. of Adults: 2
No. of Students: 20
Special Accommodations: No
No. of Wheelchairs: 0
No. of Vehicles: 1

## <u>Trip Estimate</u> - Review the Trip Estimates for the trip including additional fees and/or charges

Trip Estimate					
Trip ID:	19				
Departure Date:	5/7/2010	Trip Origin:Suppo	rt Services	Number of Vehicles: 1	L
Destination		Arrival Date/Time		Departure Date/Time	e
Wortham Theat	er 5	5/7/2010 10:00:00 A	AM	5/7/2010 2:00:00 PM	
Destination Cal	culations:				
Distance Rate:	\$1.20	Distance:	23.66	Total:	\$28.39
Open Trip Dire	ctions/Ma	pping Tool			
Time Calculation	ns:				
Start Date:	5/7/2010	Return Date:	5/7/2010		
Start Time:		Return Time:	3:00 PM	Total Trip Hours: 6.00	)
Driving Rate:	\$12.26	Driving Hours:	2.00	Total:	\$24.52
Sit Rate:	\$12.26	Sit Time Hours:	4.00	Total Sit:	\$49.04
Overnight Rate:	\$0.00	Overnight Hours:	0	Total Overnight:	\$0.00
				Total Time:	\$73.56
Total Estimated	Expenses f	or Trip:			
Tolls:	\$0.0	00 Parking:	\$10.00	Hotel: \$0.00	
Meals:	\$0.0	00 Misc Charges:	\$0.00		
				Estimate Total:	\$10.00
Calculate				Trip Total:	\$111.95
				Г	Save Estimate

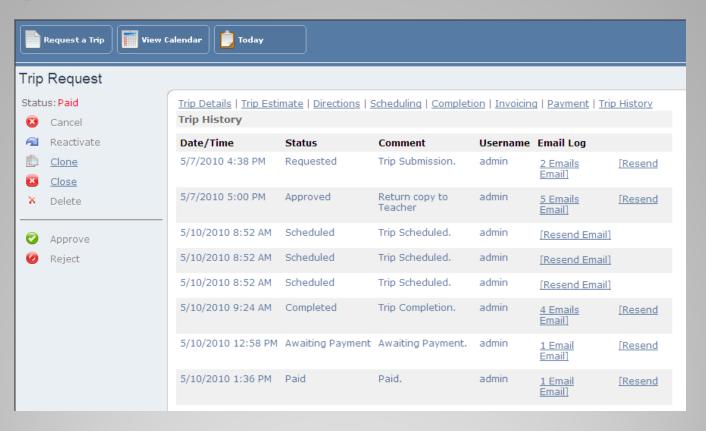
## <u>Trip Details</u> – Select <u>Approve</u> to approve the trip and enter any comments needed



## Completing an Approved Trip Request

- The Trip is Scheduled in Transportation
- Transportation Completes the trip request with the assignment of driver and vehicle
- The Trip is taken upon completion of the trip the Sponsor is responsible for signing off on the paperwork agreeing to the mileage, trip time, and additional comments.
- The trip is invoiced in Transportation
  - 1) where additional fees may be added (late return, dirty bus fee)
  - 2) accounts are billed and
  - 3) invoice generated
- The invoice is paid by the Finance department

# <u>Trip History</u> – Is Used to View Trip History - Every stage of the Trip Request process can be viewed in History.

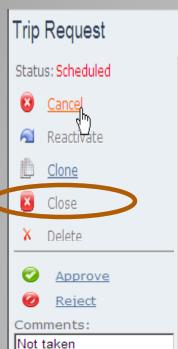


## Scenario 1 - Cancelling a Request

- Trip was cancelled
- Trip entered in error
- Trip was postponed and not re-scheduled
- Trip cannot be taken (e.g., lack of funds)

# Cancelling a Trip Request- Locate trip Select <a href="Cancel">Cancel</a>. Enter a Comment (optional) and Select "Cancel Trip"

Hi there!



Cancel Trip

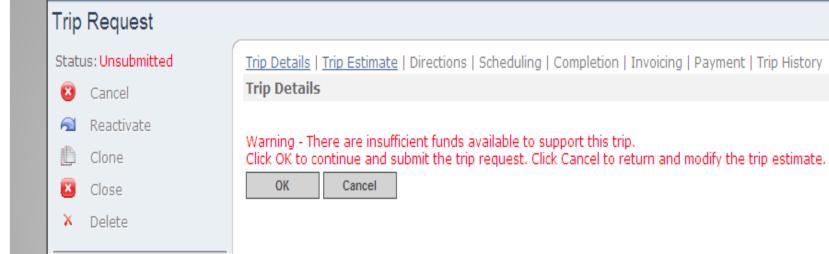
Account Notes:

Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History **Trip Details** Trip Name: Just a test Trip ID: 14 Trip Date: 5/6/2010 Trip Type: Activity: Reason for Trip: **Testing Trip Software** Submitter: admin Requester: Knight, John Edward Test 1 9999 TEST Account:

## Scenario 2 - Out of Budget

- Account requested is already below the threshold
- Estimated Costs for trip will exceed the budget
- Account is not budgeted no monies assigned
- Additional charges has placed account over budget

# Scenario 2 – Out of Budget Warning Message



Approve

Reject

# Scenario 2 – Out of Budget Solutions

 Make budget adjustment to Business Office to move additional funds to the account

Cancel trip if unable to fund

#### Scenario 3 - Out of Schedule

- Trips cannot be scheduled during route times : (leaving or returning)
  - >6:00 a.m. − 8:30 a.m.
  - ≥ 2:00 p.m. 4:30 p.m.
- Cannot schedule a trip within 5 days of the trip date

# Scenario 3 – Out of Schedule Warning Messages

Trip Details	timate   Directions   Schedulir				ns   Scheduling   Completic	on   Invoicing   Payr	ment   1
Trip Name: ju:	st a test T	rip Date: 7/20	O/Z You can n	ot schedule a trip w	ithin the AM time threshold		
Trip Details	<u>Estimate</u>   Directions   Scho		— I n   Invoicing   Payme	nt   Trip test Jemic	Trip Date:  Activity Type:	7/20/2010 Field Trip	•
You can no	ot schedule a trip within the	PM time threshold.					┙
Trip Name:	Just a test	Trip Date:	7/29/2010	<u>v</u>			
Trip Type:	Administrative	Activity Type:	Field Trip	v			
Reason for Trip:	Testing trip tracker						

# Scenario 3 – Out of Schedule Solutions

- Check times to be sure they are entered correctly
- Re-schedule trip leave or return time to an earlier or later time that falls outside of the route threshold times
- Enter Trip Request earlier than 5 days prior to the Trip Departure date
- For emergency trips contact Transportation

# Scenario 4 – Modifying & Changing Trip Details

- Select the Edit Request on the Trip Details page
- Make corrections to any detail and save the updated Trip Request
- It will be sent back to the queue for Approval

# Scenario 4 – Modifying & Changing Trip Details

<u>Trip Details</u> | <u>Trip Estimate</u> | <u>Directions</u> | Scheduling | Completion | Invoicing | Payment | <u>Trip Histo</u>

#### **Trip Details**

Trip Name: Just a test

Trip ID: 28

Trip Date: 7/29/2010
Trip Type: Administrative

Activity: Field Trip

Reason for Trip: Testing trip tracker

Submitter: VojacekB

Requester: Vojacek, Brenda

Account: Curriculum - LPH HSA 1991 11 00 001 31 038 6494

Account Notes:

Origin: LPISD Administration Building

Origin Departure Date/Time: 7/29/2010 9:00:00 AM
Origin Return Date/Time: 7/29/2010 5:00:00 PM

Destination	Arrival Date/Time	Departure Date/Time
Abshire Stadium	7/29/2010 10:00:00 AM	7/29/2010 4:00:00 PM

No. of Adults: 1
No. of Students: 30
Special Accommodations: No
No. of Wheelchairs: 0

No. of Wheelchairs: 0
No. of Vehicles: 1

Contact Name: Contact Phone:

Notes:

**Edit Request** 

### Scenario 4 - Modifying & Changing Trip Details

Trip Details   Trip Trip Details	<u>Estimate</u>   <u>Directions</u>   Sche	duling   Completion	Invoicing   Payment   <u>Trip History</u>		
Trip Name:	Just a test	Trip Date:	7/29/2010		
Trip Type:	Administrative	Activity Type:	Field Trip ▼		
Reason for Trip:	Testing trip tracker				
Account: Curriculum - LPH HSA 1991 11 00 001 31 038 6 Requester: Vojacek, Brenda					
Account Notes:	► Balance: \$901.92				
Origin:	LPISD Administration E				
Departure Date:	7/29/2010	Departure Time:	9:00 AM		
Return Date:	7/29/2010	Return Time:	5:00 PM		
Destinations:					
Destination:		¥	Can't find your destination in the list? Click here to add a new location		
Arrival: 7/2 Date Departure: 7/2	9/2010 10:00 AM	]			
Click "Add" to add the select location to the list of destinations for this trip.					
Destination	Arrival Date/Time	Departure D			
Abshire Stadiun	7/29/2010 10:00:00 A	M 7/29/2010 4	:00:00 PM Remove Edit		
Adult Number Of:	s Students Wheelch	airs Vehicles	Special Accommodations		
Contact Name:	Contact Phone:				
Notes:					
Express Trip	Save 💢	Cancel			

## Scenario 5 – Entering Overnight Trips

- Leave dates and return dates should not be the same
- Include additional fees for the trip estimate (bus driver hotel, parking fees)
- Do not schedule leave and return times during route times

## Scenario 5 – Entering Overnight Trips

Origin: LPISD Ad Departure Date: 7/29/2010 Return Date: 7/30/2010		Departure Time: Return Time:	9:00 AM 8:00 PM
Destinations:			
Destination:		▼	Can't find your destination in the list? Click here to add a new location
Arrival: 7/29/2010  Date  Departure: 7/29/2010  Click "Add" to add the sele to the list of destinations for		Add	
Destination San Antonio Convention Cen	Arrival Date ter 7/29/2010 1		re Date/Time 10 5:00:00 PM <u>Remove</u> <u>Edit</u>

#### Scenario 5 - Entering Overnight Trips

#### **Trip Estimate** Trip ID: 28 Departure Trip Origin:LPISD Administration Number of Vehicles: 1 7/29/2010 Date: Buildina Destination Arrival Date/Time Departure Date/Time San Antonio Convention Center 7/29/2010 12:00:00 PM 7/30/2010 5:00:00 PM Destination Calculations: Distance Rate: \$1.20 Distance: 449 Total: \$538.80 Open Trip Directions/Mapping Tool Time Calculations: Start Date: 7/29/2010 Return Date: 7/30/2010 Total Trip Start Time: Return Time: 9:00 AM 8:00 PM 35.00 Hours: Total: Driving Rate: \$12.26 Driving Hours: 6.00 \$73.56 Sit Rate: \$12.26 Sit Time Hours: 29.00 Total Sit: \$355.54 Overnight Total Overnight Hours: \$0.00 \$0.00 Rate: Overnight: Total Time: \$429.10 Total Estimated Expenses for Trip: \$0.00 Parking: \$85.00 Tolls: \$0.00 Hotel: Meals: \$20.00 Misc Charges: \$0.00 Estimate Total: \$105.00

Calculate

\$1,072.90

Trip Total:

## Trip Tracker- General Information

- Drivers are based on set criteria- so specific driver requests will not be honored
- Splitting trip costs between schools will need to be indicated in the trip request notes and will be processed during invoicing

## Trip Tracker- General Information

 Contact Transportation if you need to change drivers from coach/teacher to bus driver

 Sponsors will need to sign off on driver sheet following trip to acknowledge additional fees (e.g., dirty bus fee)