



# Travel Tracker

by app-garden

## Quick Reference for Funding Approvers

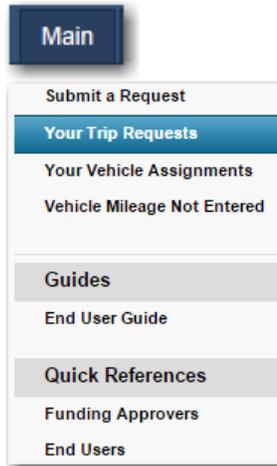
There may be multiple levels of approval required based upon options selected in the trip request such as special funding or overnight/out of state. The first level of approval is always the location level approval. This will be the person at each location designated to approve field trips at that location.

When a trip is requested it will be routed first to the location approver. If additional levels of approval are required, then as each level is approved, an email will be generated to the next approver. When all trip approvals have been obtained, the trip will then have an “Approved” status. The requestor will receive an email to indicate that the trip has been approved. Buses will still need to be assigned after the trip itself has been approved. The Travel Tracker makes it very easy for users to see the status of both the trip approvals and the bus assignments.

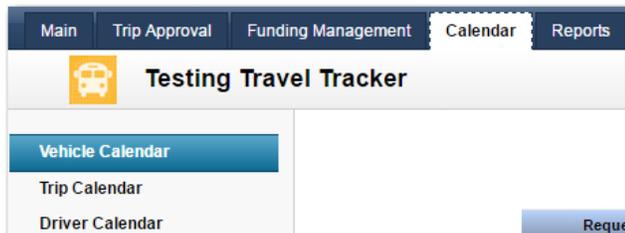
When a funding approver signs on, they have access to the tabs shown at the right.



On the Main tab, you can submit a trip request, view trip requests, view vehicle reservations and enter mileage for trips that you have created. For detailed instructions for these options, refer to the End User Guide and the End User Quick Reference.

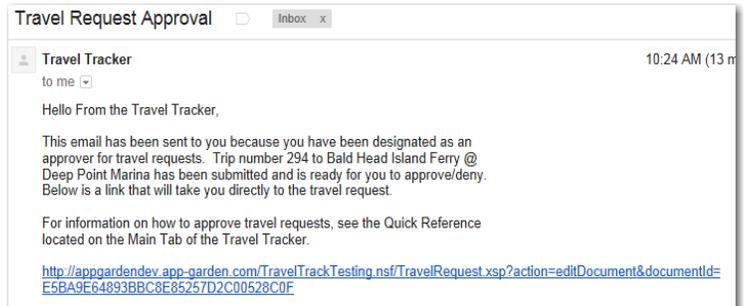


On the Calendar tab, you have the option to view the vehicle calendar, trip calendar and driver calendar. For detailed instructions for these options, refer to the End User Guide and the End User Quick Reference.



## Approving a Trip

There are 2 ways to access trips that are waiting on your approval. The first is through the email that you will receive when a user requests a trip that needs your approval along the way. In the email that you receive, there will be a link listed. When you click on the link, you can sign in and access the trip needing approval immediately.

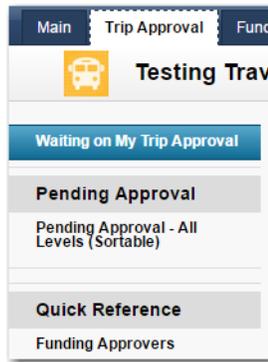


The second way is to access trips needing approval using the menus on the system.

If you are the person responsible for approving trips as a Funding Approver you will have a tab for "Trip Approval".



When you sign in, the Travel Tracker will automatically open at the Trip Approval Tab and the Waiting on My Trip Approval option.



You will be shown a list of trips that require your approval. There are several options available for sorting the trips.

Next Approver:

Sort By:  Pickup Date  Trip Nbr  Location  Submitter  Vehicle Type  Date Submitted (Latest First)

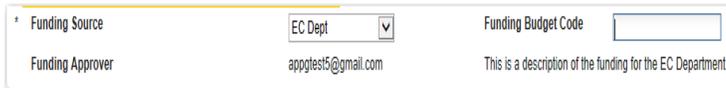
Page 1 << First

All Trips  Trips From This Day Forward

| Request for information  | Trip/Status/Next Approver | Pickup/Return | Type                     | Nbr Needed/Owner |
|--------------------------|---------------------------|---------------|--------------------------|------------------|
| 348 West Brunswick High  | 303                       | 2/15/16       | Athletic                 | 1 Activity Bus   |
| Sub By appgteach1        | Pending Funding Source    | 4:00 PM       | 303 North Brunswick High | appgowner1       |
| Sub Date 1/20/16 3:49 PM | Approval                  | 2/15/16       | Swimming                 |                  |
| Teacher Ms. Glenn        | appgtest5                 | 8:00 PM       | Fnd App appgtest5        |                  |
|                          | Adults 2                  |               | Fnd Src NBC              |                  |
|                          | Students 20               |               |                          |                  |

Click anywhere on the trip information to open the trip request.

If your county requires a Funding Source and the funding budget code is not filled in by the trip requester, you may be required to provide a funding budget code before approving the trip. If you try to submit the trip request and you are required to enter the budget code, you will get an error message.



Funding budget code must be entered at Funding Source Approval Level.

Scroll to the bottom to the Approval Section.

Enter comments if desired.

To approve the trip request, click on the circle to the left of “Approved”.

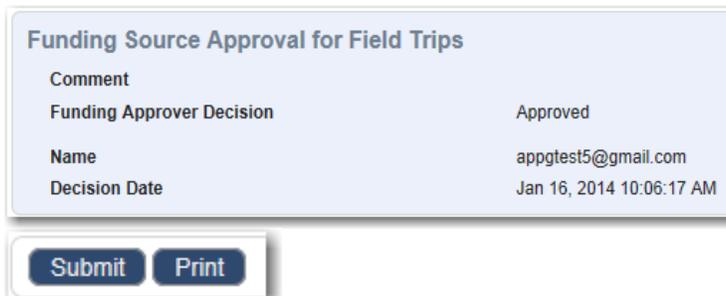
To deny the request, click on the circle to the left of “Denied”. If you deny a trip, you should enter the reason why in the comment area. These comments will be emailed back to the requestor along with the indication that the trip has been denied.



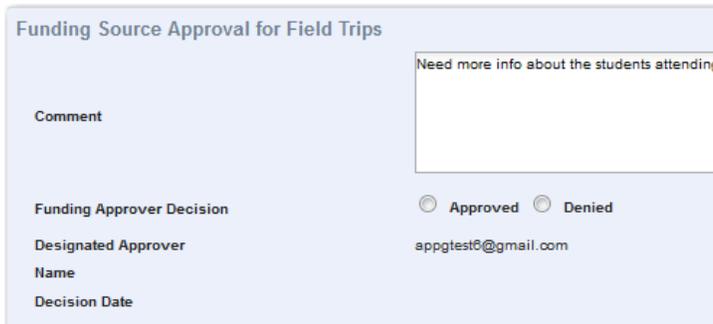
Once you select your option you will see the Approved/Denied, your name and the date.

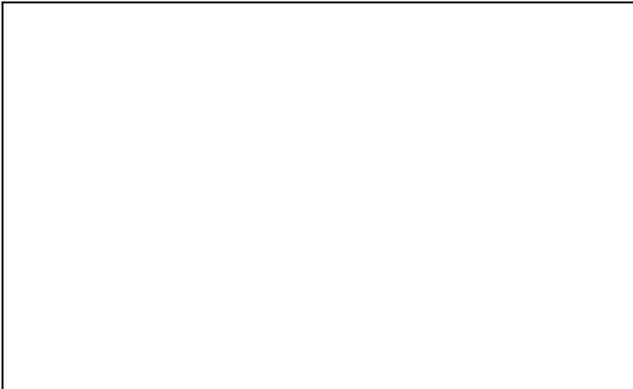
You can click on Print to print the trip request.

Click on Submit to submit the request.



If more information is needed before the trip can be approved, add the comments to the comment section and then submit without selecting an approver decision. This will create a comments icon that will be displayed on the “Waiting on My Trip Approval” screen and it will be seen by the trip requester on the “Your Trip Request” screen





| Requestor Information                                 |                 |
|---|-----------------|
| 348 West Brunswick High                               | 409             |
| Sub By: appgteach1                                    | Pending Funding |
| Sub Date: 6/29/16 11:36 AM                            | appgtest6       |
| Teacher   | Adults          |
| Comments: Need more info about the students attending |                 |

If you would like to email any information to the trip requester or anybody else associated with the trip, click on the Send Email button before you submit the request. This provides an easy way to communicate about the trip. This will open a window where you can type a message to the trip requester. Their email is automatically shown in the Send To: box. Note – you can edit this and send to someone else if needed. If you would like to send to multiple email addresses, you need to put a semi-colon between the email addresses. Your email address will automatically be sent as the reply to email. When the requester receives the email, they can reply and it will come to your regular email. There will be a link to the trip in the email message that is sent.

Request Status: Pending Location Approval  
Final Approval Date

Reschedule Trip | Cancel Trip/Reservations | Create Duplicate Request | Save Current Trip | **Send Email** | Comments

**Email To Requester - You may change the "Send To" name on this email**

Please separate multiple email addresses with a semicolon.  
Send To: appgteach1@gmail.com

Subject: [ ]

Message: [ ]

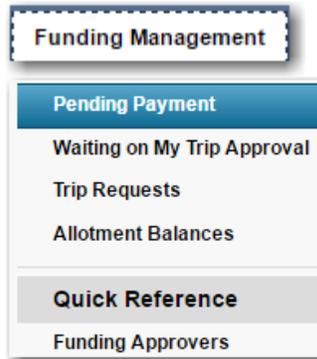
Send Now | Close

All emails that are sent for a trip are listed in the Email log (note you may need to refresh the screen to see an email that was just sent). If you hover over the envelope icon you can see the text of the email.

| Email Audit Log:   |                |                 |                      |
|--------------------|----------------|-----------------|----------------------|
| Subject:           | Email Sent on: | Email Sent by:  | Email Sent To:       |
| Level 8 Approver   | 04/11/2016     | Principal2 Test | @gmail.com           |
| Vehicle Assignment | 04/11/2016     | Owner1 Test     | appgteach1@gmail.com |

## Funding Management

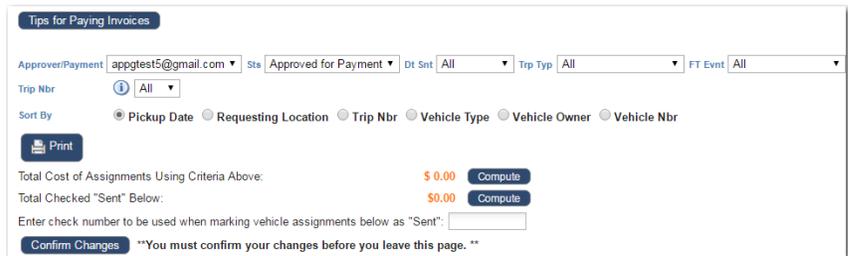
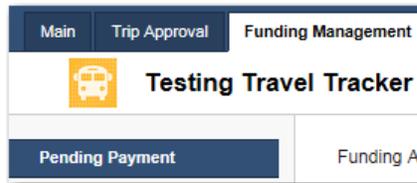
We have provided several useful options under the Funding Management tab.



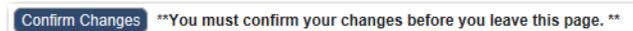
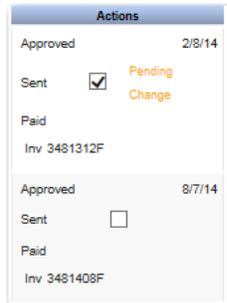
We have provided an easy way for the Funding Approver to send payment for an invoice.

Click on the Funding Management tab and select the Pending Payment option.

You will be viewing your invoices with the invoice status of Approved for Payment. They can be sorted by Pickup date, requesting location, trip number, vehicle type, vehicle owner and vehicle number. This will provide a list of all trips that have been released by transportation for payment. If you would like to search by trip number, change the status to all and then click on the drop down arrow next to Trip Number.



From this screen, you can mark invoices as sent by putting a check in the box next to Sent. You will see the Pending Change message. This means that you must click on the Confirm Changes button before you leave the page.



If you need to review the invoice or would like to add a comment, you can click on the trip number to open the invoice. The top part of the invoice indicates the Trip number, destination, Date and trip requestor and the additional funding information.

The funding source and funding code can be edited here.

The Ending Vehicle Use section shows the breakdown of charges for this trip.

The total cost indicates the payment that is due for this trip.

Scroll to the bottom and you will see the information for payment. When you are sending a check for this trip, click on the Payment Sent button. This will indicate to the person receiving the payment that you have sent a check for this. You also have the option to add a comment and check number that will be seen by the person posting the payment.

Note the Invoice Number. You can include the invoice number and trip number on the check if you would like.

Print

Trip Code **501** Trip Type Athletic Boys Basketball

Requesting Location **348 West Brunswick High** Zone Zone 001

Destination/Description **326 North Brunswick High** Comment

Vehicle Dates/Times

Pickup **12/8/16 5:00 PM** Trip Yr/Wk **2016-50 Bid Id Not Found**

Return **12/8/16 7:00 PM** Trip Hrs **2.00**

Vehicle Location **348 West Brunswick High** Current Owner **appgowner1@gmail.com**

Vehicle Type **Activity Bus** Change Vehicle Number **8022** Change Override

Vehicle Phone(s)

Teacher

Funding Source(s)

Fund #1 **FUND1** Approver **appgtest5@gmail.com** Pct **50** Amt **\$217.18**

1000 271 660000 348 0618  Check to retain General Fund - Band Payment

Submit Trip Submitted By **appgteach1@gmail.com** Created **11/8/16 6:01 PM** By **appgowner1@gmail.com**

Ending Vehicle Use

Driver Cost

Driver Name **Teri Schoenhardt** Change Override Driver Email **tschoenhardt@gmail.com**

Driver Phone **7045172011**

Driver Hrs **0.00** Driver R/Hr **\$23.00**  Check to retain **\$0.00**

Driver OT Hrs **0.00** Driver OT R/Hr **\$26.00**  Check to retain **\$0.00**

Driver Other Hrs **0.00** Driver Other R/Hr **\$25.00**  Check to retain

Driver Flat Rate **Select \$0.00**  Check to retain

Driver Benefits: SS **\$0.00** Med **\$0.00** Ret **\$0.00** WkCmp **\$0.00**  Driver Pd **\$0.00** Driver Cost **\$0.00**

Pickup Person

Assistant Cost (Optional)

Mileage Cost

Est Mileage **66.58** Miles Driven **66.58**

Est Odometer **0.00** Pickup Miles **10.00** Cost Per Mile **2.0000**  Check to retain

End Odometer **0.00** Total Miles **56.58** Additional Cost/Mi **1.5000**  Check to retain

Mileage Cost: **\$198.03**

Fuel Cost

Total Miles **56.58** Mi/Gal **10.00** Fuel Cost: **\$14.15**

5.658 gal fuel @ \$2.50 (Price/Gal)

Additional Veh Cost

Return Cond **Select** Return Cond Cat **\$0.00** Std Trip Fee **\$5.00**

Veh Chg Type **N/A** Veh Chg Amt **\$0.00** Additional Fee **\$0.00** Additional Veh Cost **\$5.00**

Additional Inv Cost

Cost #1 **Select** **\$0.00**  Check to retain

Cost #2 **Select** **\$0.00**  Check to retain

Cost #3 **Select** **\$0.00**  Check to retain

Cost #4 **Select** **\$0.00**  Check to retain

Additional Inv Cost **\$0.00**

Mechanic Assigned for Inspection (Optional) **Select**

Comments Concerning Vehicle

(Transportation Dept will be notified)

Total Cost: **\$217.18**

Payment Information

Trip Cd **501** Inv Nbr **3481612A** Inv Dt **2016/12**

Inv Amt **\$217.18**

Invoice Status

Approved for Payment

Payment Sent

| Approved By                               | Payment Sent By | Paid By | Do Not Bill By |
|---|-----------------|---------|----------------|
| appgtrans1@gmail.com<br>12/14/16 10:04 AM |                 |         |                |

Check Nbr

Comments for Person Responsible for Payment

Once you click on Payment sent you will see your userid and the date and time listed in the "Payment Sent By". Click on Submit to submit the payment and return to the Invoicing screen.

The Print button at the top will allow you to print a copy of the invoice if needed.

Payment Information  
 Trip Cd 501 Inv Nbr 3481612A Inv Dt 2016/12

Inv Amt \$217.18

| Invoice Status | Approved By                              | Payment Sent By                        | Paid By | Do Not Bill By |
|----------------|--|--|---------|----------------|
| Payment sent   | appgrans1@gmail.com<br>12/14/16 10:04 AM | appgtest5@gmail.com<br>4/19/17 1:55 PM |         |                |

Check Nbr: \_\_\_\_\_  
 Comments for Person Responsible for Payment: \_\_\_\_\_

[Print](#)

Trip Code **501**  
 Requesting Location **348 West Brunswick High**  
 Destination/Description **326 North Brunswick High**

The Waiting on My Trip Approval option under the Funding Management Tab gives the same view that you have from the Trip Approval Tab.

Main | Trip Approval | Funding Management

Dev County Schools Tra

Pending Payment  
 Pending Payment by Trip  
**Waiting on My Trip Approval**  
 Trip Requests  
 Vehicle Assignments

Next Appro  
 All Trips  
 Reque

Once a trip has been approved, it will be removed from the Waiting on My Trip Approval screen. If you need to view the trip again, you can click on the menu option Trip Requests under the Funding Management tab. This will give a list of all the trips, regardless of status, that have Funding Approval.

Main | Trip Approval | Funding Management

Dev County Schools Tra

Pending Payment  
 Pending Payment by Trip  
 Waiting on My Trip Approval  
**Trip Requests**  
 Vehicle Assignments

Funding App  
 All Trips  
 Reque  
 307 Brunsw

| Requestor Information  | Trip/Status/Next Approver   | Pickup/Return                     | Type   |
|--|---|-----------------------------------|--|
| 348 West Brunswick High<br>appgleach1@gmail.com<br>1/16/14 9:21 AM | <a href="#">177</a><br>Approved   | 2/3/14 8:00 AM<br>2/3/14 12:00 PM | Field Trip<br>Brunswick County Bowling Center<br>appgtest5@gmail.com |
| 348 West Brunswick High<br>appgleach1@gmail.com<br>1/16/14 9:47 AM | <a href="#">180</a><br>Pending Funding Source Approval<br>appgtest5@gmail.com | 2/5/14 8:00 AM<br>2/5/14 12:00 PM | Field Trip<br>Brunswick County Food Bank<br>appgtest5@gmail.com      |

The Allotment Balances option under the Funding Management tab allows you to view the budget allotment and the estimated balances for your funding sources.

Funding Approver or Responsible for Payment: appgtes5@gmail.com Print

| Funding Source | Beginning Budget Dt | Ending Budget Dt | Budget Allotment | Inv App for Payment | Inv Pmt Sent | Inv Paid | Balance    | Inv Pending | Trips Without Reservations | Est Bal    |
|----------------|---------------------|------------------|------------------|---------------------|--------------|----------|------------|-------------|----------------------------|------------|
| CTE            | 7/1/14              | 6/30/15          | \$0.00           | \$0.00              | \$0.00       | \$0.00   | \$0.00     | \$0.00      | \$0.00                     | \$0.00     |
| SBA            | 7/1/15              | 6/30/16          | \$2,000.00       | \$0.00              | \$0.00       | \$0.00   | \$2,000.00 | \$440.80    | \$11,758.45 (\$10,196.25)  | \$0.00     |
| SBA1           | 7/1/15              | 6/30/16          | \$2,000.00       | \$0.00              | \$0.00       | \$0.00   | \$2,500.00 | \$500.40    | \$40.00                    | \$1,959.60 |
| sba2           | 7/1/15              | 6/30/16          | \$5,000.00       | \$104.95            | \$287.00     | \$0.00   | \$4,547.96 | \$1,432.01  | \$343.28                   | \$2,772.67 |
| SBA3           | 7/1/15              | 6/30/16          | \$200.00         | \$0.00              | \$0.00       | \$0.00   | \$200.00   | \$120.48    | \$130.16                   | (\$56.64)  |
| SBA4           | 7/1/15              | 6/30/16          | \$200.00         | \$0.00              | \$0.00       | \$0.00   | \$200.00   | \$253.16    | \$84.62                    | (\$137.78) |
| SBA5           | 7/1/15              | 6/30/16          | \$200.00         | \$0.00              | \$0.00       | \$0.00   | \$200.00   | \$75.96     | \$0.00                     | \$124.04   |
| SBA6           | 7/1/15              | 6/30/16          | \$200.00         | \$0.00              | \$0.00       | \$0.00   | \$200.00   | \$0.00      | \$0.00                     | \$200.00   |

## Reports Tab

You have the option to export the Assignment/Trip information to Excel. Click on the Reports tab, make your selections and then click on Export to Excel

Main | Trip Approval | Calendar | **Reports**

### Testing Travel Tracker

Requesting Location: 0004 Conway High   
 Funding Approver/Payment: All  
 Vehicle Owner: All

Having the trip assignment information available in Excel, gives you the ability to create custom reports.

Printed By: Curr1 Test | Date: 4/19/17 12:00 AM

**Trip Assignments**

Filters On/Off | Mileage Difference

Dates/Times |  Teacher |  Requestor |  Destination |  Driver Cost |  Funding Source/Budget Code  
 Vehicle Info |  All Miles |  Driver Info |  Yr/Man |  Planning Cost/Rate |  Estimated Trip Hrs  
 Overnight/OOS |  LRF? |  Invoice Info |  Field Trip Type |  Payment Comments |  Other Cost-Break Down  
 Pick-Up Drop-Off |  Bid Id |  Delimited Budget Code

| Requesting Location     | Teacher      | Type          | Athletic Event     | Trip Numbr | Leave Date             | Leave Time | Return Date            | Return Time | Destination                     | RT Miles | Mileage Rate | Driver Cost | Assistant Cost | Mileage Cost | Fuel Cost | Other Cost | Additional Mileage Cost | Total Cost | Amount Due Y/N |
|-------------------------|--------------|---------------|--------------------|------------|------------------------|------------|------------------------|-------------|---------------------------------|----------|--------------|-------------|----------------|--------------|-----------|------------|-------------------------|------------|----------------|
| 348 West Brunswick High | Mr. Green    | Field Trip    |                    | 6          | 2015 04/30 08:00:00 AM |            | 2015 04/30 11:30:00 AM |             | Brunswick County Bowling Center | -5.30    | \$2.00       | \$0.00      | \$0.00         | (\$10.60)    | (\$1.58)  | \$5.00     | \$0.00                  | (\$7.18)   | N              |
| 348 West Brunswick High |              | 66.6 Athletic | This is a length 9 | 9          | 2015 04/30 03:00:00 PM |            | 2015 04/30 07:00:00 PM |             | 326 North Brunswick High        | 56.60    | \$2.00       | \$0.00      | \$0.00         | \$113.20     | \$0.00    | \$0.00     | \$56.60                 | \$169.80   | N              |
| 348 West Brunswick High |              | 66.6 Athletic | This is a length 9 | 9          | 2015 04/30 03:00:00 PM |            | 2015 04/30 07:00:00 PM |             | 326 North Brunswick High        | 56.60    | \$0.00       | \$0.00      | \$0.00         | \$0.00       | \$0.00    | \$5.00     | \$0.00                  | \$5.00     | N              |
| 348 West Brunswick High | 241.98 Staff |               |                    | 5          | 2015 04/30 10:00:00 AM |            | 2015 04/30 12:00:00 PM |             | Campbell University             | 231.98   | \$0.75       | \$0.00      | \$0.00         | \$173.99     | \$69.36   | \$0.00     | \$0.00                  | \$243.35   | N              |